UNIVERSITY OF OTTAWA

Supervisors

HALOGEN USER GUIDE

uOttawa

Ressources humaines
Human Resources

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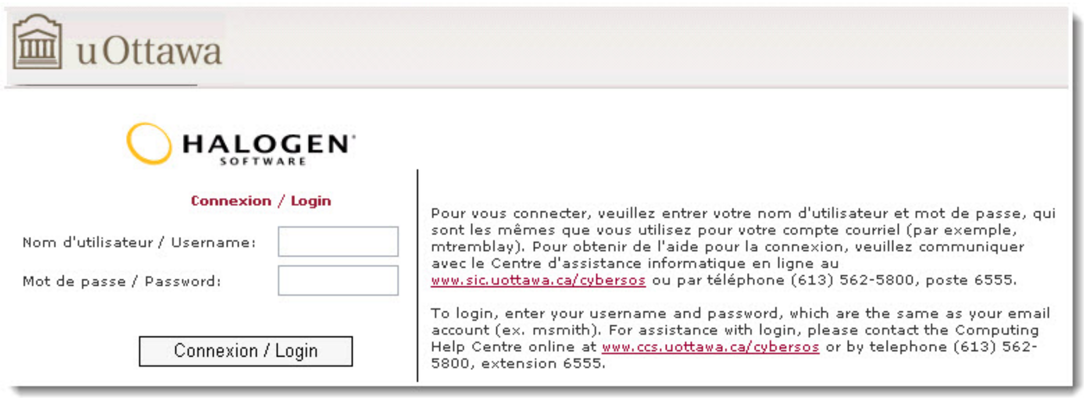
Version: 1809

Contents

Logging in to Halogen

Starting a session

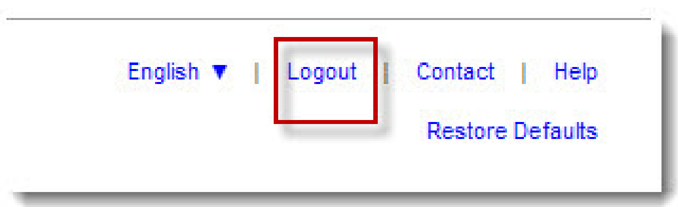
Session length is limited to two hours. Once you are logged in, you can remain logged in for two consecutive hours. After two hours, you are automatically logged out.



1. Open Halogen.
2. Enter your user name.
3. Enter your password.
4. Click *Login*.

Ending a session

Halogen contains confidential data. As a security measure, you should sign out of Halogen session correctly by clicking *Logout* in the upper right corner of the screen.



Immediately after logging out, you will be taken back to the login page.

Introduction to Halogen

Introduction

This guide is designed to help you learn how to use Halogen and to act as a reference manual.

Why Halogen?

Halogen is a Web-based application for managing performance through the use of electronic forms and automated processes.

With Halogen, users can:

1. Set annual goals, indicate probationary periods, schedule mid-cycle meetings and complete annual performance evaluations for contract and regular staff through the use of forms.
2. Access the appropriate forms, based on their user type.
3. Automatically manage tasks to be completed, based on their user type.
4. Schedule automated email reminders to staff about completing tasks in Halogen.
5. Produce reports in real time.

User types

User types are tied to the position a staff member holds.

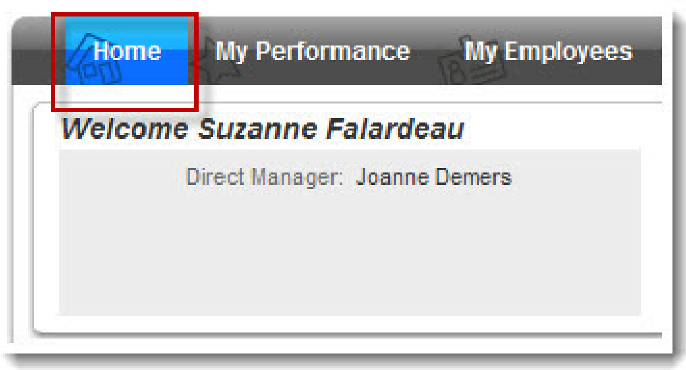
1. Employee: A staff member responsible for completing the goal-setting forms and the semi-annual and annual evaluation forms.
2. Supervisor: A staff member with direct-report employees.
3. Administrator: A Human Resources employee responsible for managing Halogen.

The Halogen interface

Finding your way around

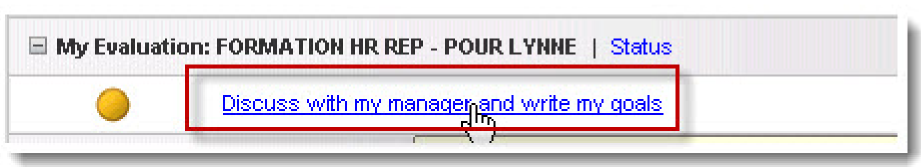
Here are a few helpful hints for finding your way around in Halogen.

1. A top tab highlighted in blue indicates the name of the page you are on.



2. Text in blue indicates a link, which opens in another window

.

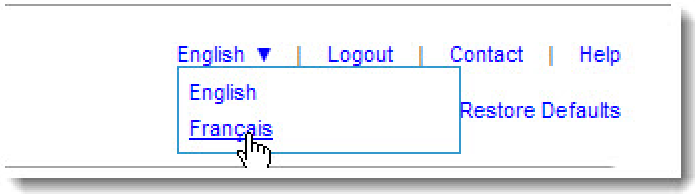


Changing the interface language

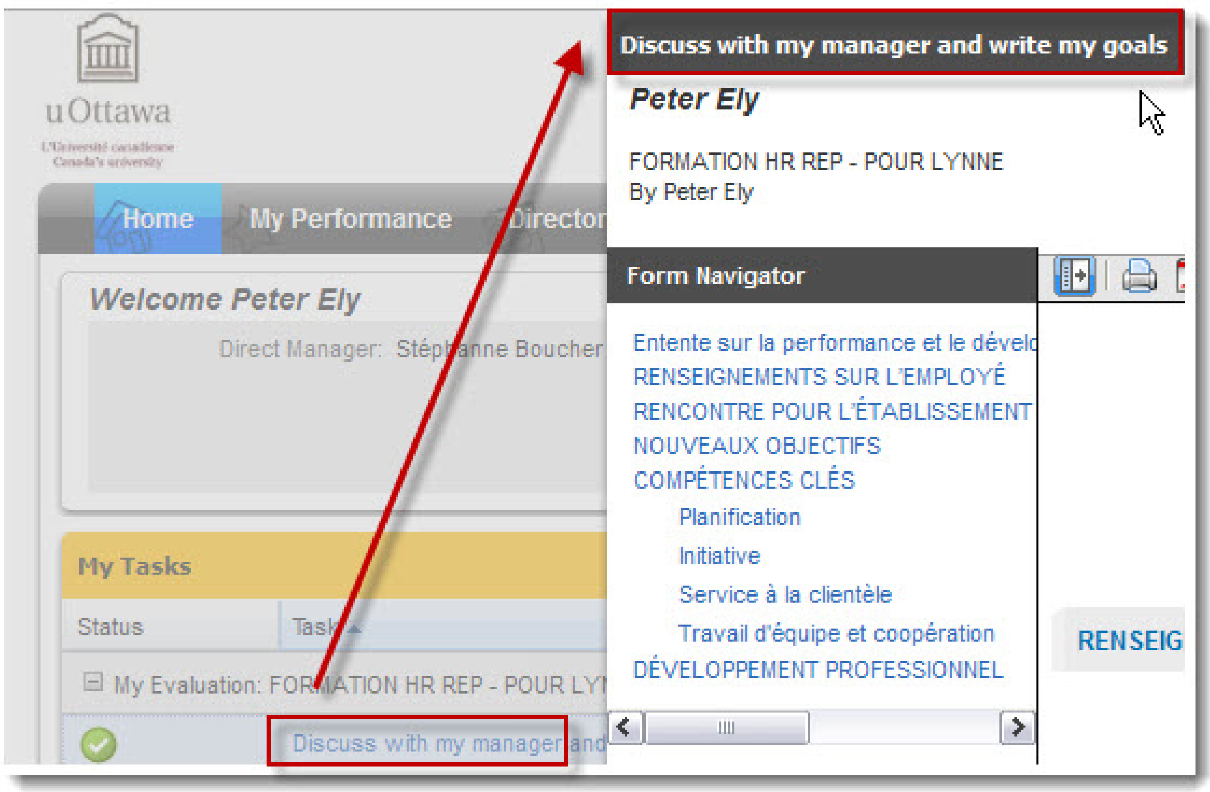
This application is available in both official languages, so you can work in the language of your choice.

The interface changes to French as soon as you select *Français*. However, when you change the language you are taken back to the Home page and not to the page you

were on when you changed the language.



The default language is set when a user account is created. Forms for the user will always appear in the user's preferred language. Whether you are using the French or the English interface, however, forms are always displayed and published in the preferred language chosen for the user when the account was created.

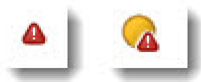
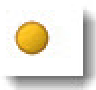
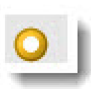


Tasks

In Halogen, steps to be completed in the ongoing process are considered "tasks." Employees' tasks may be, for example, entering their goals in an online form, and submitting them to their supervisor for review. Supervisors, of course, have a greater number of tasks since they must enter their own goals in addition to reviewing and

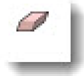
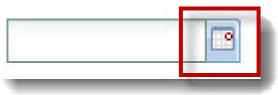
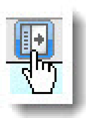
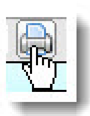
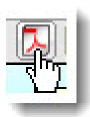
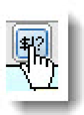
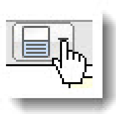
approving the forms submitted by each employee that reports to them. An icon indicates the status of each task.

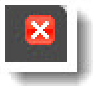
Task status icons:

Icon	Meaning
	Task past due and requires attention.
	Task requires your attention but is not past due.
	Task awaiting third party review.
	Task is not ready for your participation.
	Task is completed and no longer requires your attention.
	Task requiring attention of another user but not past due.

Interface icons

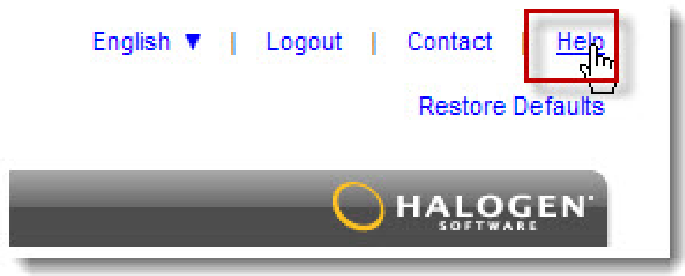
Icon	Function or meaning
	Links a goal to an organizational goal.

Icon	Function or meaning
	Erases a title, description, due date or success indicator of a goal.
	Indicates the goal is linked to an organizational goal.
	Indicates a date field that opens a calendar to enter a date.
	Starts spell checker. You will be asked to set the language.
	Adds a note.
	Expands or collapses the form navigator pane.
	Prints the form.
	Creates a PDF version of the form.
	Built-in language checker reviews text for any offensive or potentially embarrassing words or statements and suggests alternatives.
	Split screen function.

Icon	Function or meaning
	Closes the form.

Help

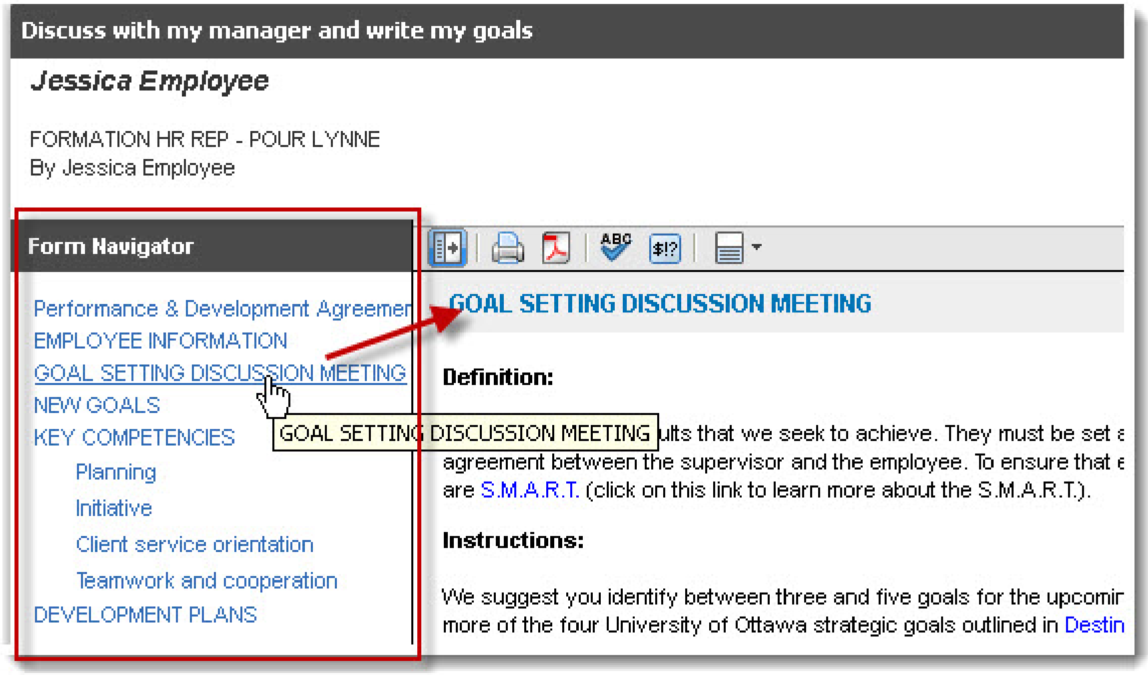
Online help is available in Halogen. Simply click *Help* in the upper right corner.



The form navigator pane

Each form (performance evaluation, goal setting, end of probationary period, mid-year evaluation, etc.) has multiple sections. The form navigator pane allows you to easily and quickly move between sections.

The form navigator pane appears to the left of the form. You can use either the form navigator or the scroll bar to move from one section of a form to another, although the navigator pane allows you to do so more quickly.

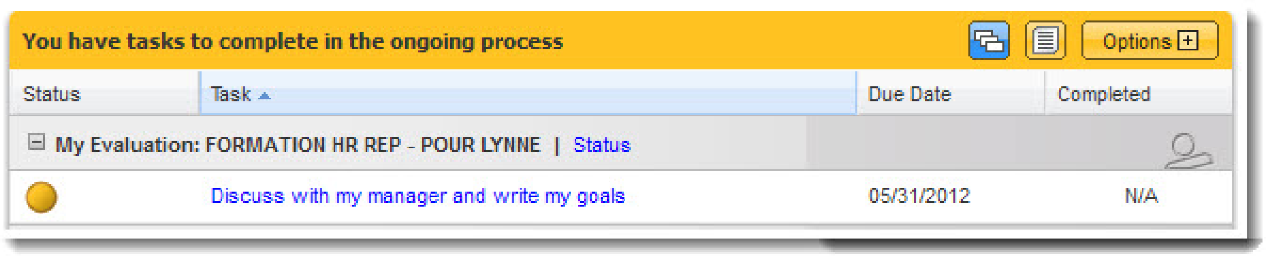

Discuss with my manager and write my goals
Jessica Employee
FORMATION HR REP - POUR LYNNE
By Jessica Employee
Form Navigator
Performance & Development Agreemen
EMPLOYEE INFORMATION
GOAL SETTING DISCUSSION MEETING
NEW GOALS
KEY COMPETENCIES
Planning
Initiative
Client service orientation
Teamwork and cooperation
DEVELOPMENT PLANS
GOAL SETTING DISCUSSION MEETING
Definition:
GOAL SETTING DISCUSSION MEETING
ults that we seek to achieve. They must be set a
agreement between the supervisor and the employee. To ensure that e
are S.M.A.R.T. (click on this link to learn more about the S.M.A.R.T.).
Instructions:
We suggest you identify between three and five goals for the upcomir
more of the four University of Ottawa strategic goals outlined in Destin

Main functions

Tasks to complete

The *You have tasks to complete in the ongoing process* pane provides employees and supervisors with an overview of any tasks they have yet to complete (their own tasks and those of any employees they have).

Users can display these tasks in grouped view, task view or in a single list. In addition, each column can be sorted in ascending or descending order.



This pane also displays the status and due date of tasks.

Users will usually receive an email indicating a task has to be started or completed. The email message can also include the user's log-in name, temporary password and a link to launch Halogen. Once logged in, the user sees a quick overview of any tasks requiring action.

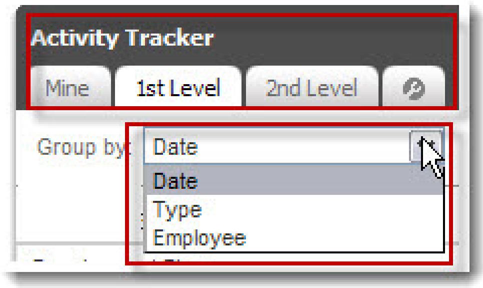
When a given process is complete and the supervisor has signed the form off, Halogen posts the form in the *Evaluation* section of the *My Performance* page.

Activity tracker

The activity tracker pane appears on the right-hand side of the home page. It lists journal notes, appraisals and documents that have been updated in *My Performance*. Items can be sorted by date (newest to oldest) or by type.

1. Changes made to goals and development plans appear only after the goal setting process has been completed, i.e., after the supervisor has given final approval.
2. The group of tabs that displays in the *activity tracker* depends on the user type.
   a. Employees: *Mine*.
   b. First-level supervisors: *Mine* and *1st level*.
   c. Second-level supervisors *Mine*, **1st Level** and **2nd Level**.
3. Activities in the *Mine* tab can be grouped by date or type.

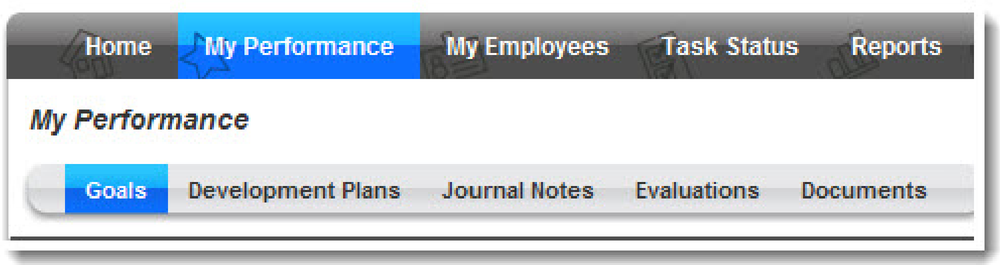
4. Activities of direct reports can be grouped by date, type or employee.



My Performance

My Performance

My Performance is a centralized portal where a user can access and update performance information in the following sections:



- Goals
- Adding a development plan
- Adding a journal note
- Evaluations
- Documents

Supervisors have access to these same five sections in the *My Employees* page.

Important:

If you add goals or development plans in *My Performance*, this information is not automatically added to the goal setting form completed at the start of the performance evaluation cycle. As a result, these goals and development plans will not be formally evaluated at the end of the cycle.

Adding a goal

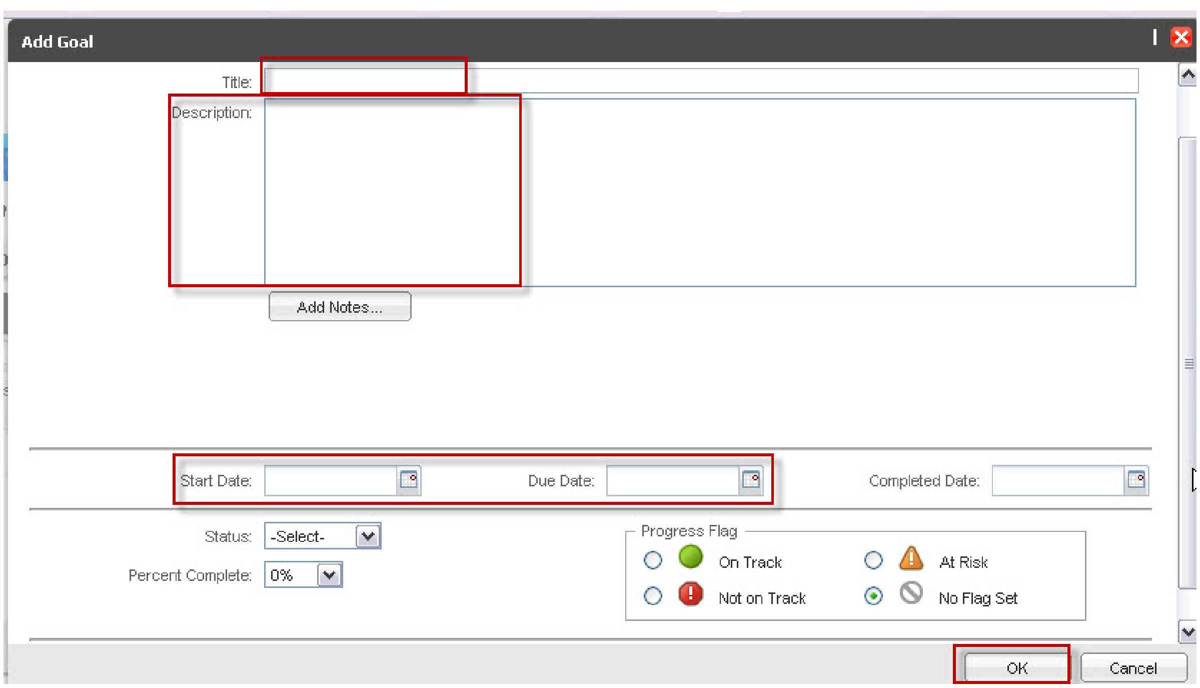
A goal is a target that an employee is encouraged to reach, generally within a specified period of time. Goals can be added by both employees and supervisors. An employee can also add goals after an evaluation has taken place. Employees and supervisors can consult the employee's goals at any time. Goals entered in the goal setting form will appear in this section once the goal setting process has been completed.

1. Supervisors: click *My Employees* and then the name of the employee for whom a goal is to be added.
2. Click *Goals*.

   NB: The objectives you added will not be kept in the goal setting form that you completed at the beginning of the cycle.

3. Click *Add*.

4. Enter a *title* in the Title field. .

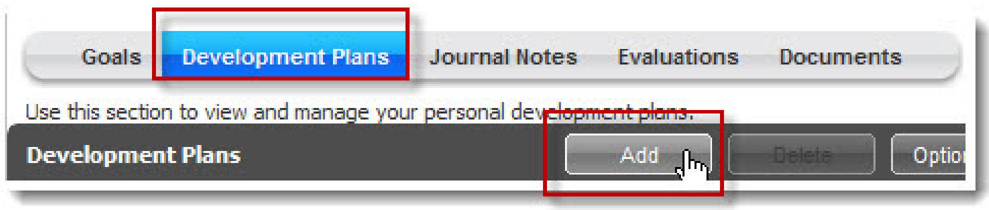


5. Provide a detailed description of the goal in the *Description* field.
6. Click on the calendar icon next to the Start *Date field* and select a start date.
7. Click on the calendar icon next to the *Due Date* field and select a due date.
8. Click *OK*.

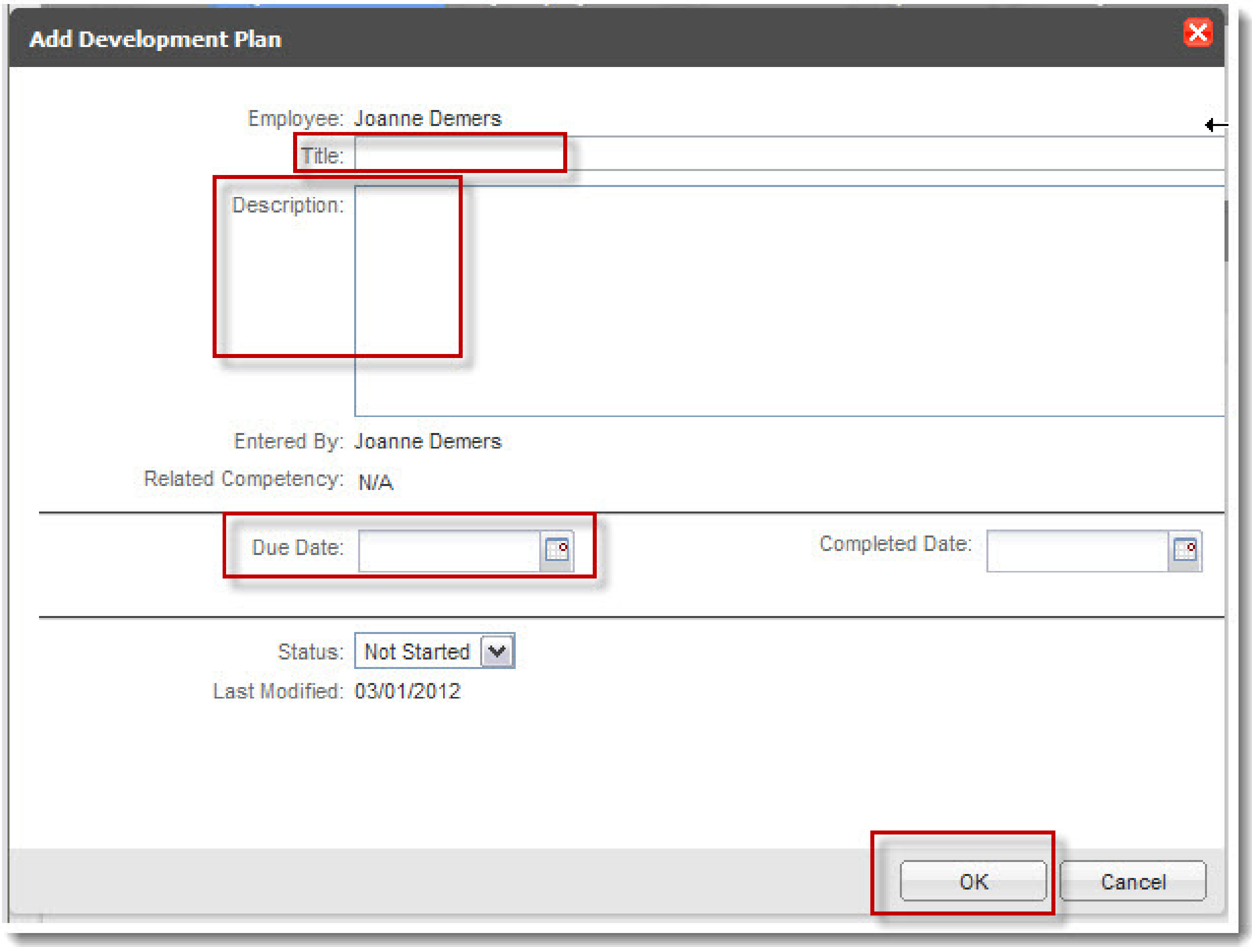
Adding a development plan

A development plan added here will not be added to the goal setting form completed at the start of the cycle.

1. Supervisors: click *My Employees* and then the name of the employee for whom a development plan is to be added.
2. Click *Development Plans*.
3. Click *Add*.



4. Enter a title in the *Title* field.

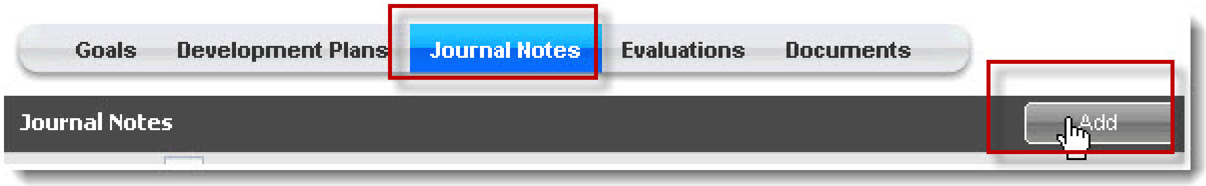


5. Provide a detailed description of the development plan in the *Description* field.
6. Click on the calendar icon next to the *Due Date* field and select a due date.
7. Click *OK*.

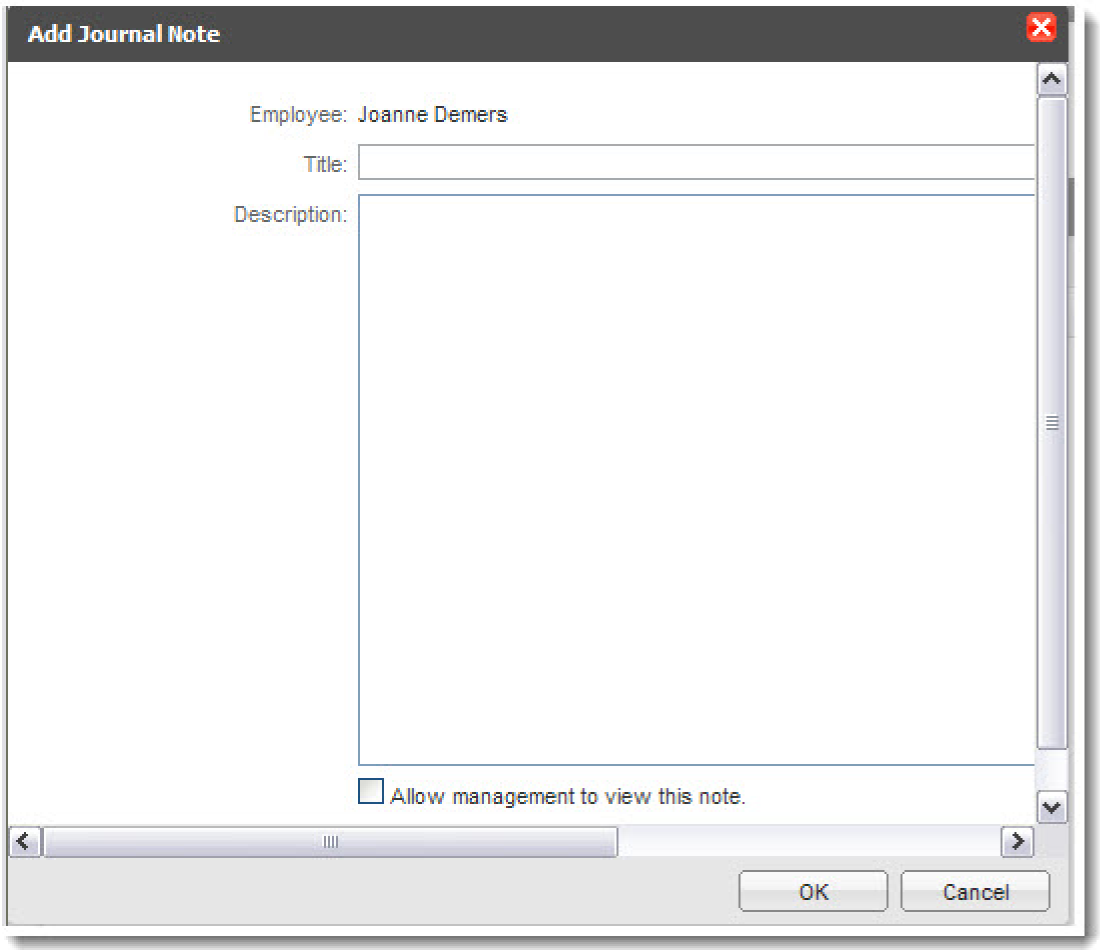
Adding a journal note

Employees can use the journal notes section to track their achievements during the year, which can be helpful at evaluation time. For example, a journal note could be added to note registrations increased by 2%.

1. Supervisors: click *My Employees* and then the name of the employee for whom a journal note is to be added.
2. Click *Journal Notes*.
3. Click *Add*.



4. Enter a *title* for the note in the Title field.



5. Enter the journal note details in the *Description*.

6. Employees who arrived at this section through the My Performance page can check the box next to *Allow management to view this note* if they wish to allow their supervisor to see this note. Supervisors who arrived at this section through the My Employees page can check the box next to Let the employee view this note if they wish to allow their employee to see this note.

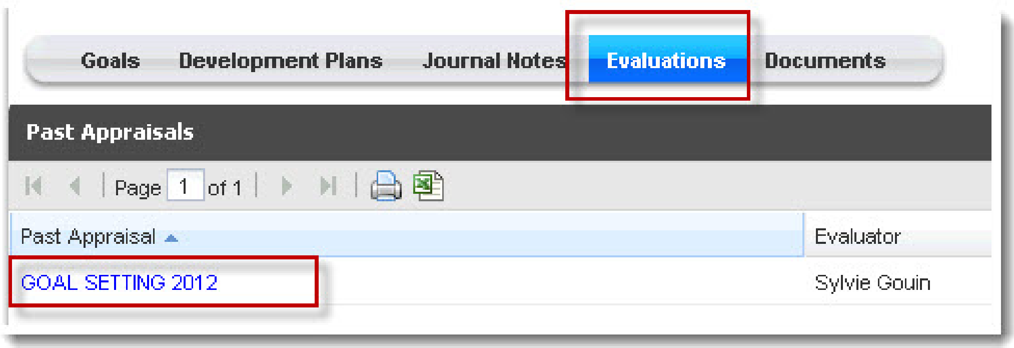
7. Click *OK*.

Evaluations

Supervisors may review their own forms and evaluations as well as those of their employees at any time. This allows supervisors to monitor both personal and employee progress.

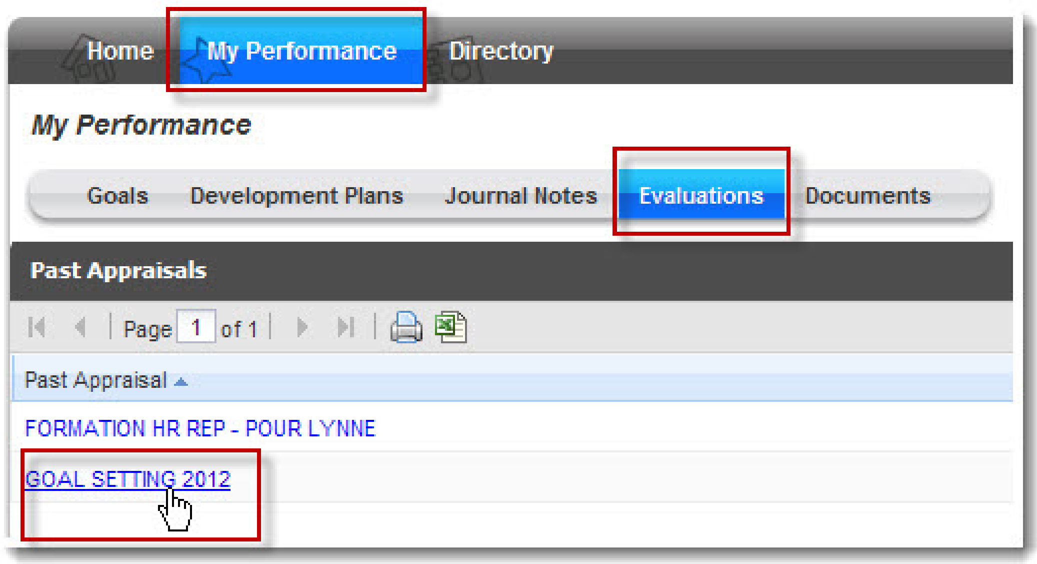
Note:

Past appraisals have not been imported into Halogen. Therefore, 2012 is the first annual performance evaluation cycle to be recorded in Halogen. Once the 2012 goal setting process is complete, this form will appear in the *Evaluations* section.

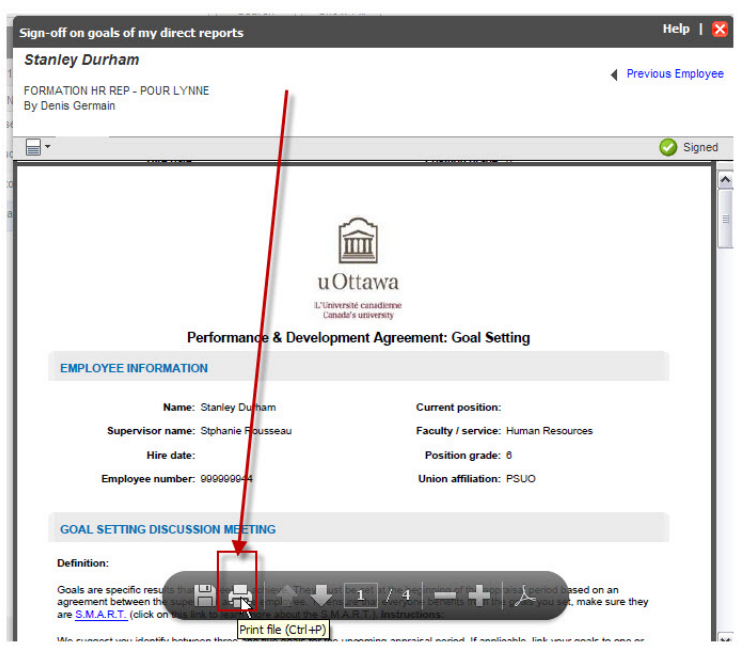


Print a completed form

1. Click the *Ma Performance* tab.
2. Click the *Evaluations* tab.
3. Click on the name of the form to be printed in order to create a PDF document.



4. Once the PDF form appears, place your curser at the bottom of the document to view the translucent Adobe toolbar.
5. Click on the printer icon on the toolbar.
6. Click *Print* to send your document to the printer.



Adding a document

Employees can add, consult and delete performance-related documents for themselves. Supervisors can add, consult and delete performance-related documents for themselves and their employees.

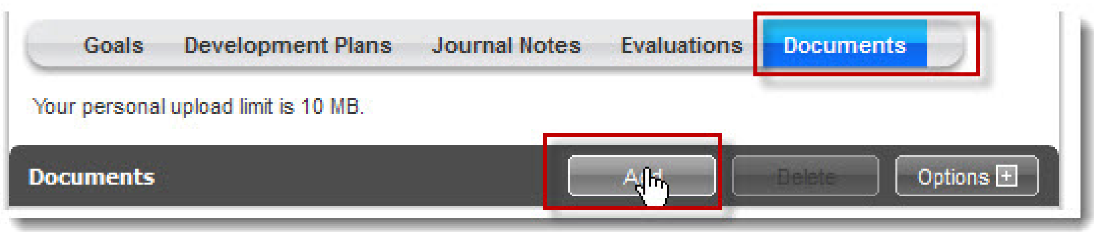
Supervisors can set document visibility parameters (access) for any documents they add for an employee by selecting the *Employee and Management* or the *Management radio button*.

Users can add documents with the following filename extensions :

- .PDF
- .DOC
- .DOCX
- .TXT
- .XLS
- .XLSX
- .JPG
- .GIF
- .BMP

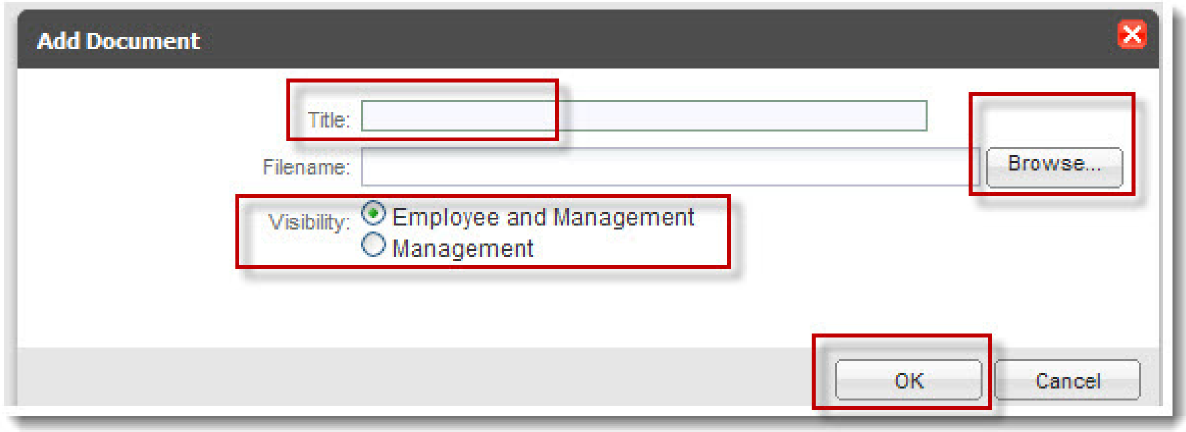
1. Click the *Documents* tab.

2. Click *Add*.

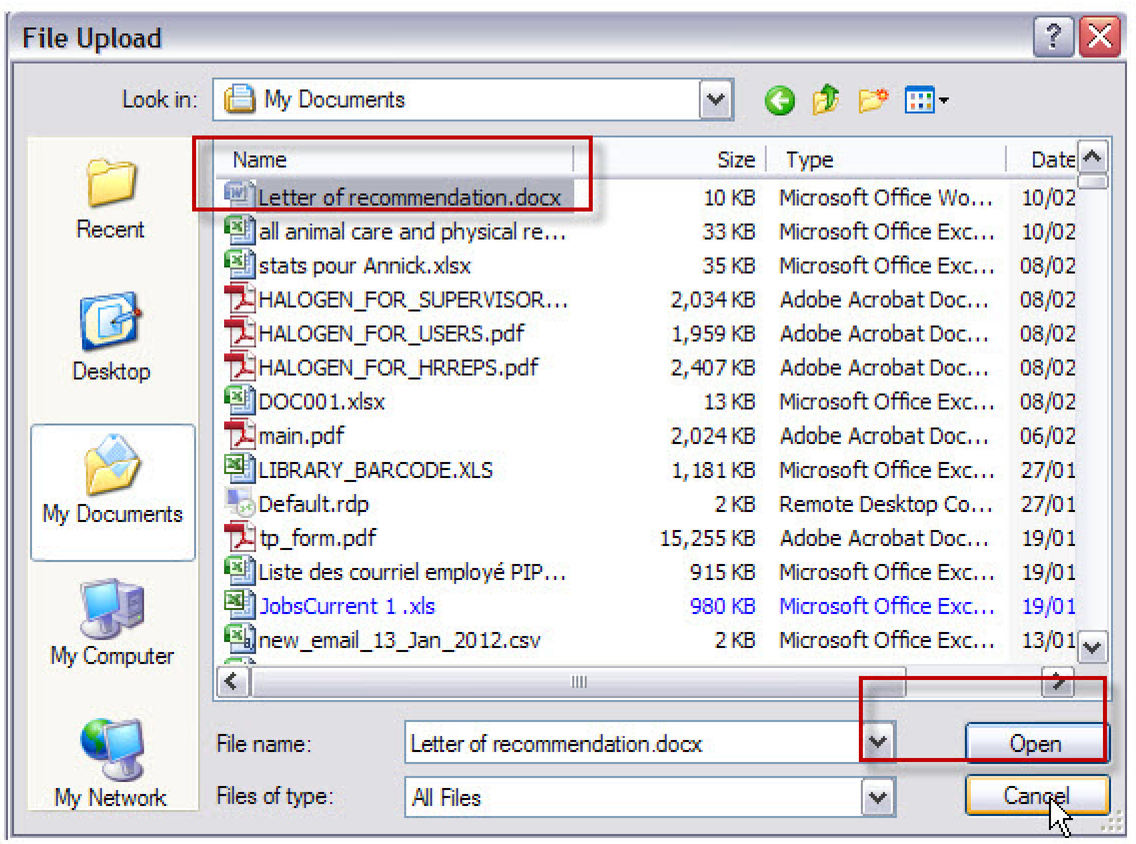


3. Enter a title for the document in the *Title* field.

4. Click *Browse*.



5. Locate and click on the document to be added.
6. Click on the Employee and Management or the Management radio button to set document visibility (access).
7. Click *Open*.



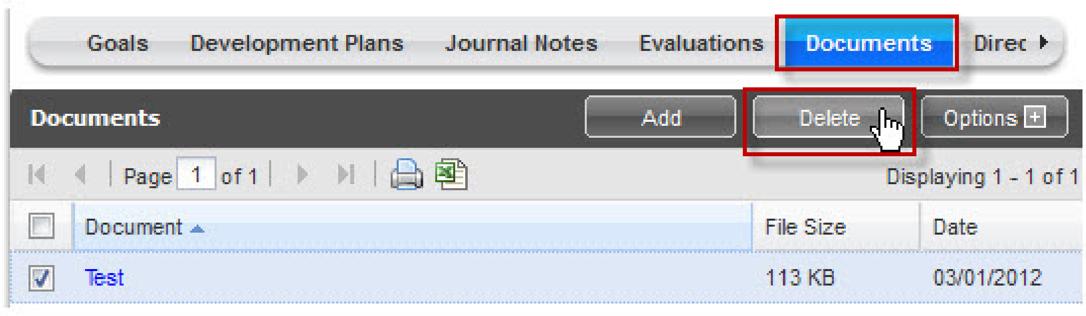
8. Click *OK*.

Deleting a document

You can delete a document from the *Documents* section.

1. If you are a supervisor, click *My Employees* and then the name of the employee whose document is to be deleted.

2. Click the *Documents* tab.



3. Put a checkmark in the box next to any documents to be deleted.

4. Click *Delete*.

5. Click OK.

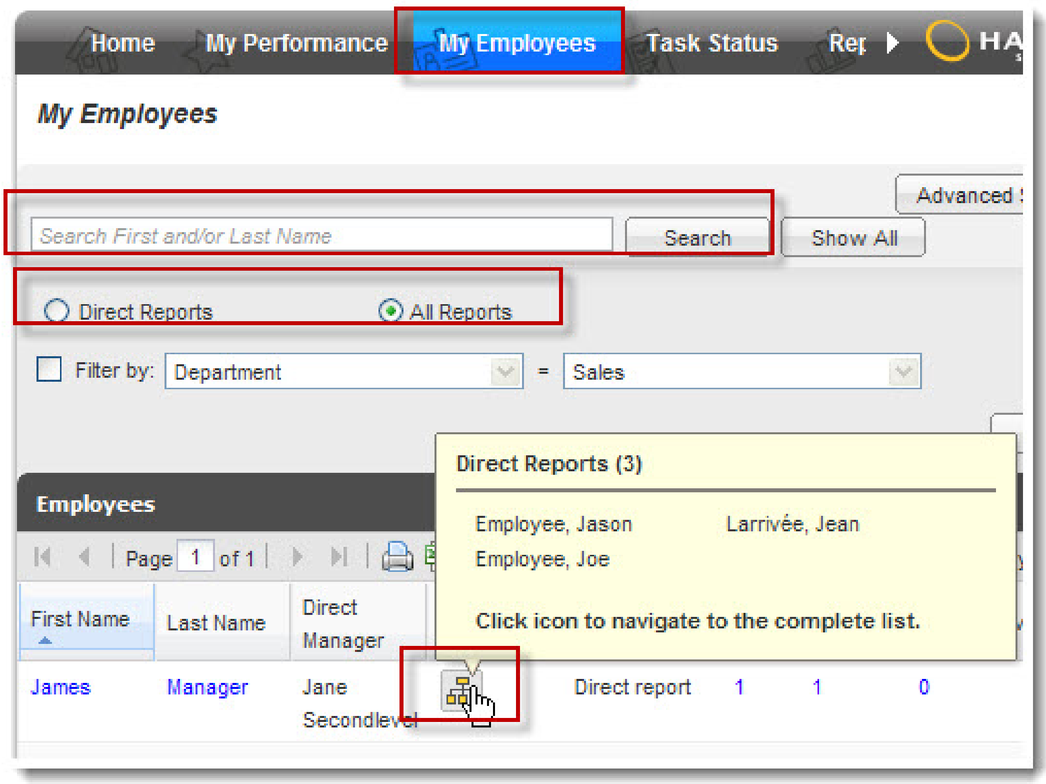
My employees

Supervisors have access to the *My Employees* area, which provides a list of all direct report employees and their records.

Supervisors responsible for many employees can enter a full or partial employee name in the search box, use the advanced search function or activate a list filter.

A supervisor can set the filter to show the records of Direct Reports or All Reports. Therefore, supervisors can view:

1. Employees who report directly to them.
2. Employees who report directly to them and that employees direct reports.
3. The *My Employees* section uses icons to indicate which employees have other employees reporting directly to them and/or which employees report two more than one supervisor simultaneously (secondary managers).



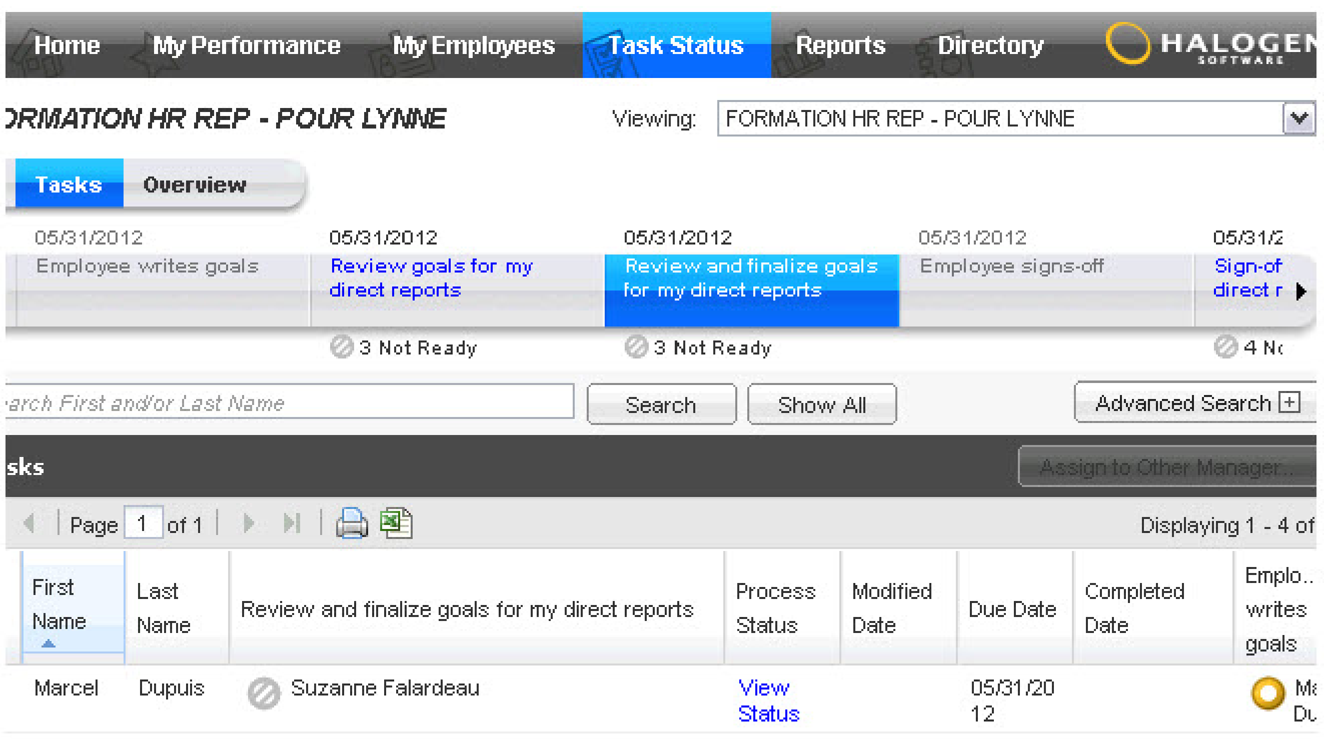
The icon legend appears at the bottom of the *My Employees* page.

Task status

This section allows supervisors and Human Resources administrators to consult their own tasks and their employees' tasks.

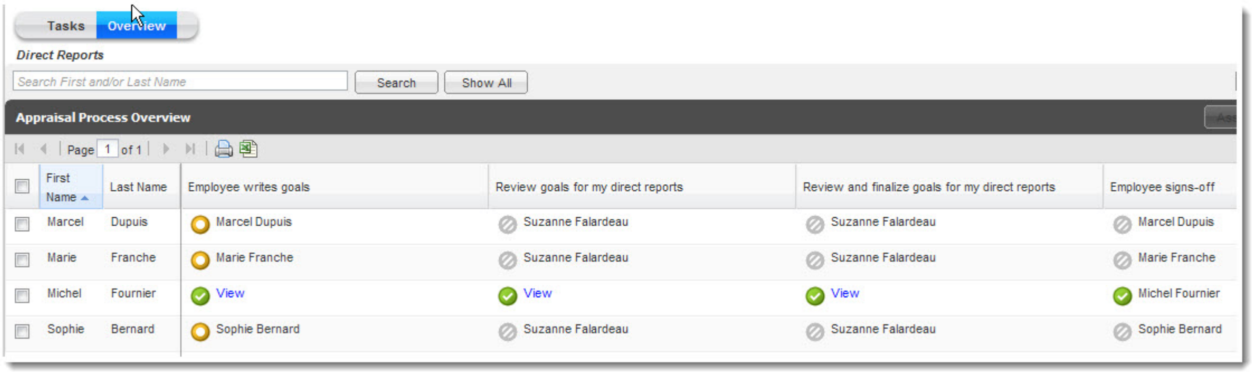
Supervisors and administrators can view the details for an individual step in the process or an overview of the tasks for all process steps.

Note, however, that the overview **is available only for the supervisors and administrators responsible for a particular process and the employee involved in the process** .



The overview display shows where each of the reports is in the process.

The example below shows that three employees have to complete the goal setting process and one has already completed it.

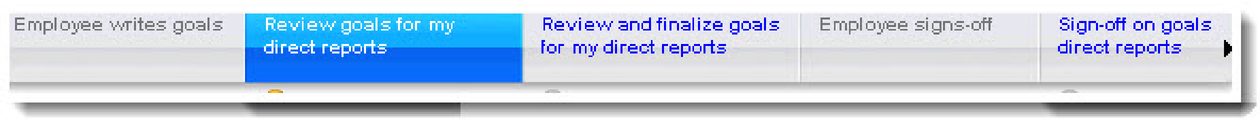


First Name	Last Name	Employee writes goals	Review goals for my direct reports	Review and finalize goals for my direct reports	Employee signs-off
Marcel	Dupuis	Marcel Dupuis	Suzanne Falardeau	Suzanne Falardeau	Marcel Dupuis
Marie	Franche	Marie Franche	Suzanne Falardeau	Suzanne Falardeau	Marie Franche
Michel	Fournier	View	View	View	Michel Fournier
Sophie	Bernard	Sophie Bernard	Suzanne Falardeau	Suzanne Falardeau	Sophie Bernard

Goal setting by the employee

Setting goals

The process of setting goals is broken down into tasks done by either the employee or the employee's supervisor.



Start of the goal setting process: The supervisor schedules a meeting with the employee to set goals for the coming year, to identify the behaviours necessary to maintain or improve performance levels in each competency and to draw up a development plan that will allow the employee to achieve their goals and reach the required competency levels.

The employee must:

1. Enter the date of the meeting with the supervisor.
2. Add up to five goals
3. Enter the specific behaviours for each competency necessary in order to maintain or improve performance levels in each competency over the next evaluation period.
4. Enter a development plan.
5. Save the draft form (can be modified up until it is submitted for approval).
6. Submit the form for approval. The employee can no longer modify the form.

The supervisor must:

1. Review the draft of the employee's goal-setting form. If not satisfied, the supervisor can return the form back to the employee for necessary modifications. If satisfied, the supervisor approves the preliminary review and proceeds to the next step of the process.
2. Review and finalize the employee's draft form. At this step, the supervisor can write directly in the form to make necessary changes.
3. If necessary, add comments to key competencies.
4. If necessary, add comments to the development plan.
5. Save the form.
6. Complete the form

End of the goal setting process

The employee approves the goal setting form by entering his password. The form is now marked *completed*.

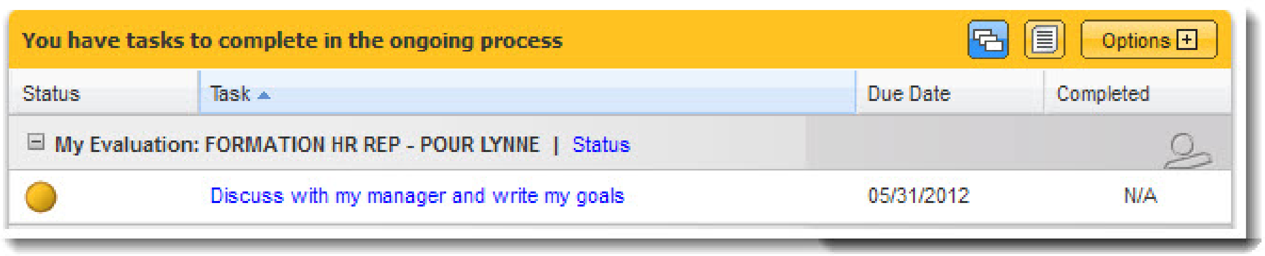
The supervisor gives final approval, also by entering his password to completing the goal setting process.

Meeting to discuss goals

The first step in completing an annual evaluation is the employee–supervisor meeting in order to establish goals. Once the meeting has taken place, the employee drafts personal goals in Halogen.

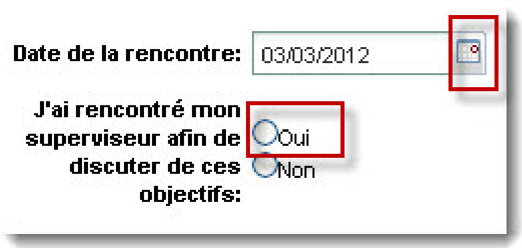
Drafting goals (employees):

1. Click *Discuss with my manager and write my goals*.



2. Once the goal setting form opens, click the calendar icon in the meeting section, next to the *Date of discussion* field and select a meeting date

3. Select *Yes* to confirm that the meeting was held and that the goals were discussed with the supervisor

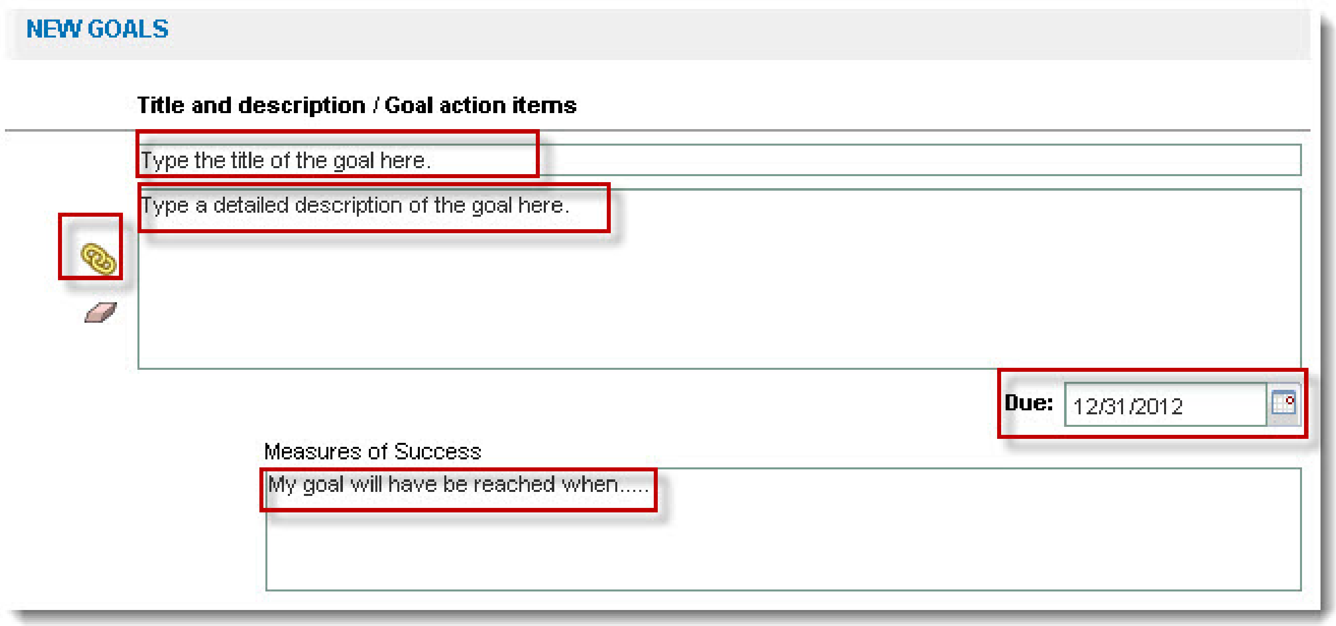


Adding a goal

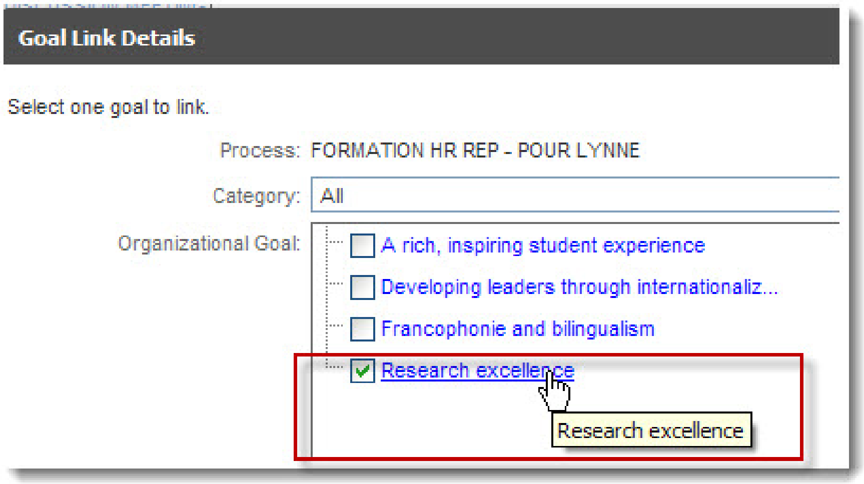
All employees must write up their goals at the start of the annual performance management cycle. Halogen allows the employee to enter up to five goals. The steps

below describe the process for drafting and editing a goal (for employees) and for editing a goal (for supervisors):

1. Under the heading *Title and description / Goal action items*, type the title of the first goal.



2. In the second box, type a detailed description of the goal.
3. Click the calendar icon next to the *Due* box and select the required date.
4. In the*Measures of successs* box, type one or more indicators.
5. Click the chain link icon to link the goal to an organizational goal.
6. Select the organizational goal the employee goal is to be linked to.



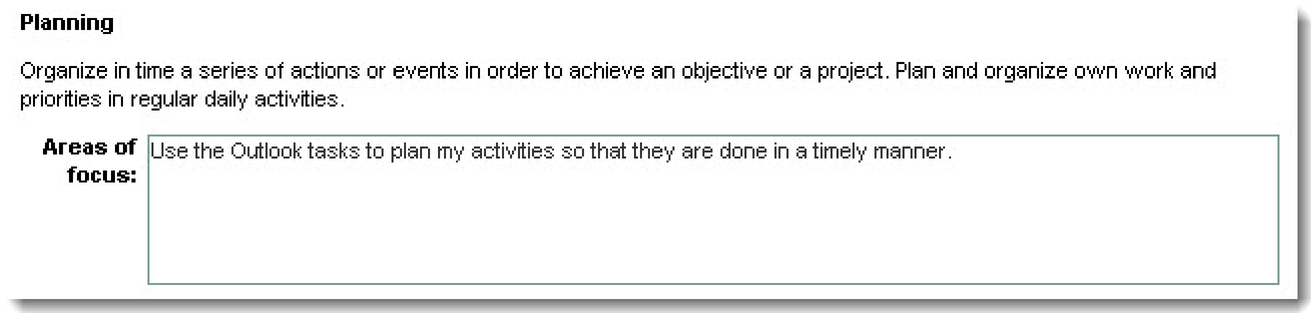
7. Click *Link*.

8. To add another goal, click *Add New Goal*.

Linking behaviours to key competencies

The key competencies section is for recording the behaviours an employee must adopt or maintain in order to improve or remain at their level of performance for each of the four competencies. When a supervisor opens a form submitted by an employee, the supervisor is able to make changes to the form. Next section describes the steps for an employee to record behaviours.

1. In the *Areas of focus* box, the employee describes a behaviour that will help them acquire, maintain or improve their level for a given competency.



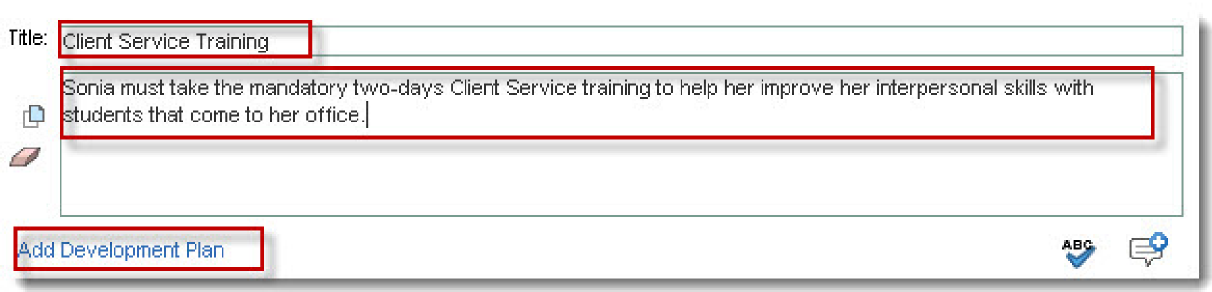
2. Click *Add Anotation* to attach any comments.

3. Repeat steps 1 and 2 for each of the other competencies.

Adding a development plan

Employees and supervisors can use the development plan section to describe possible training activities that would provide the employee with opportunities for career advancement or help the employee improve their skill level. The development plan can be completed by either the employee or the employee's supervisor. To add a development plan, follow the steps below.

1. Give the development plan a title.

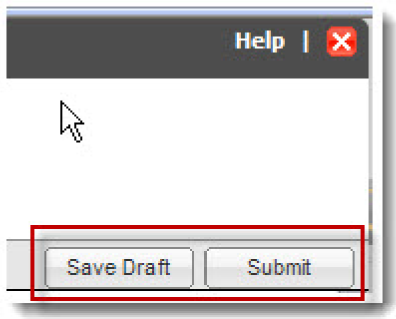


2. Enter a description of the proposed training activity.

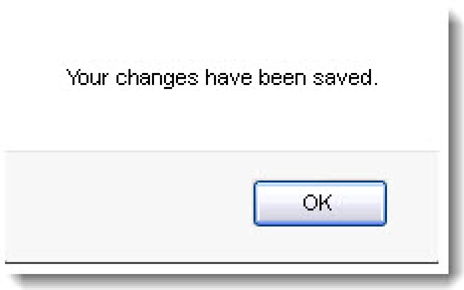
3. Click *Add Development Plan* to add another plan.

Saving the draft version

Click *Save Draft* furthering order to save the form and continue editing. When you have finished entering your plan(s), click *Submit*. The form can now be viewed but not changed and is submitted to the supervisor for review and approval.

1. 

Click *Save Draft* .
2. Click *OK*

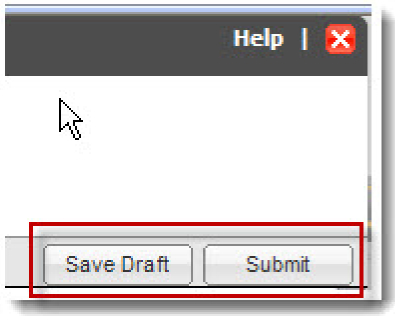


.

Submitting a form for approval

Once there are no further changes to make to the form, it is submitted to the employee's supervisor for review and approval. A supervisor cannot view the form until the employee has submitted it for review and approval.

Click *Submit* once there are *no more changes to be made* to the form.

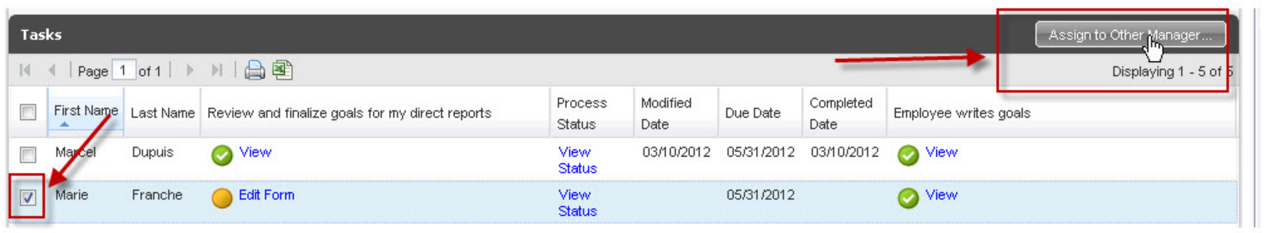


Reviewing and approving goals by supervisor

Reassigning a form to another supervisor

If supervisors receive forms for approval in error, they must reassign them to the appropriate supervisor. To reassign a form for approval :

1. Click Review goals for my direct reports.
2. Put a checkmark next to the name of the employee whose form must be assigned to another supervisor.
3. Click *Assign to Other Manager*.



Reviewing and approving goals

On the *Task Status* page, a supervisor can see in the Tasks pane whether an employee has finished setting goals. If the task is complete, the supervisor must then:

1. Click *Review goals for my direct reports*.
2. Click *Review and finalize goals for my direct reports*.

   Halogen opens the employee's completed form. The supervisor will not be able to edit it at this point, except to add comments for the employee. The supervisor can now review and approve the form or return it to the employee if the information does not reflect what was agreed upon at the initial meeting. If the supervisor decides not to return the form to the employee, the supervisor can modify it at the next step in the process.

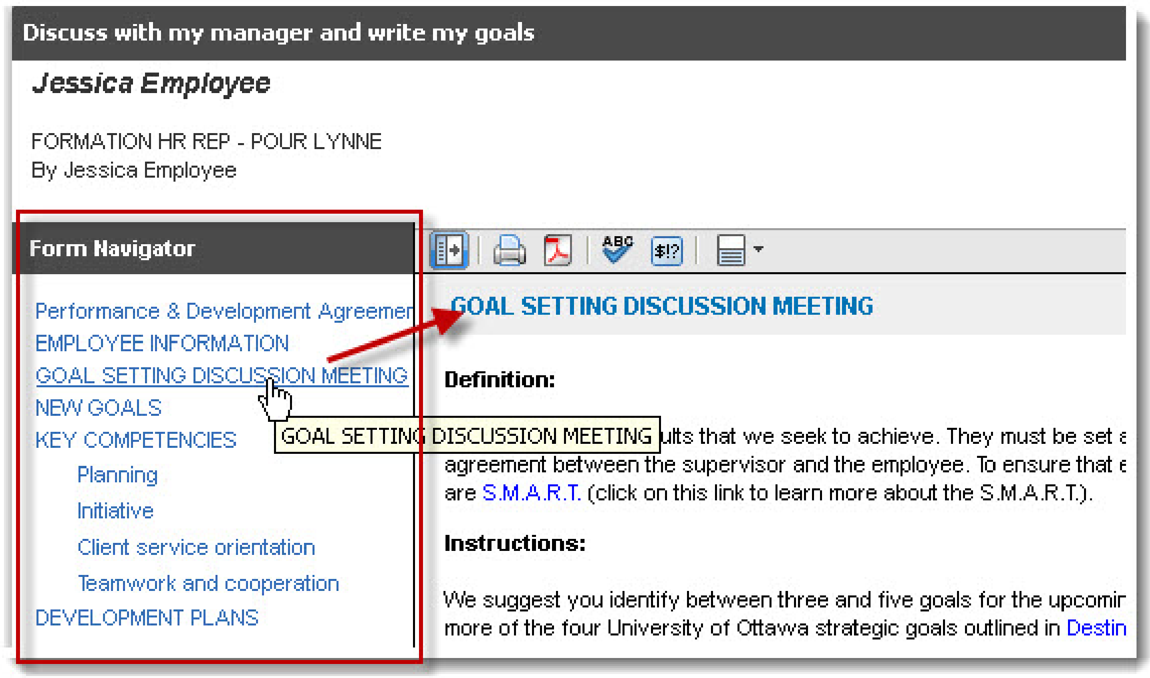
Approving the form or returning it to the employee

A supervisor must ensure that the employee's goals reflect what was agreed upon at the initial meeting.

If there are any discrepancies, the supervisor can return the form to the employee by clicking *Send Back to Author* or make changes at the next step.

1. In the form navigator, click *Goal Setting Discussion Meeting*.

   Make sure the meeting date has been entered and that the employee has selected Yes next to I have met with my supervisor to discuss these goals.



2. Click *New Goals* and confirm that the goals match what was agreed upon with the employee. If not, add comments and click *Send Back to Author*.
3. Click *Key Competencies* and confirm that the notes added match what was agreed upon with the employee. If not, add comments and click *Send Back to Author*.
4. Click *Development Plans* and confirm that the notes added match what was agreed upon with the employee. If not, add comments and click *Send Back to Author*.
5. Click one of the three following buttons:

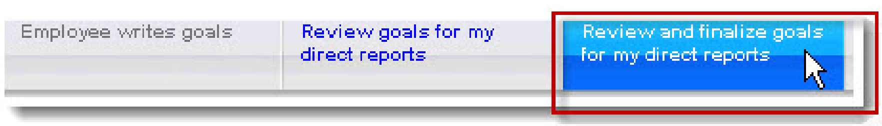
- *Save Draft* if the review is not yet finished.
- *Send Back to Author* if the employee needs to make corrections.
- *Approve*, if no corrections are necessary.

6. Click *X* in the red box to close the form.

Reviewing and finalizing the goal setting form

A supervisor can make changes to a form. A changed form is then sent back to the employee to give their approval.

1. 1. Click on the tab for the third step of the Goal Setting process.



2. Click Edit *Form*..

3. In *Form Navigator*, locate any sections to be changed (*Goal Setting Discussion Meeting, New Goals, Key Competencies and Development Plan*).

4. Click

- *Save Draft*, to complete the review at a later time.
- *Submit* to send the modified form to the employee for their final approval.

5. Click the *X* in the red box to close the form.

Reviewing and finalizing goals of the next employee

After approving an employee's goal setting form, a supervisor can then go to the next employee's form.

Click *Next Employee*.


Help
Previous Employee
Next Employee

Approbations

Employee final approval

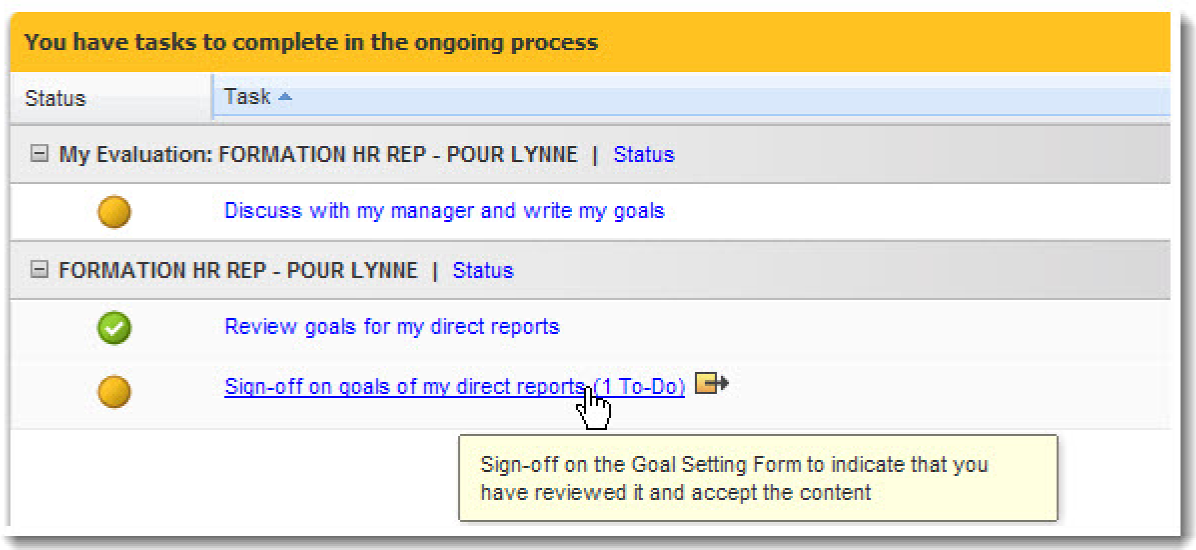
Once a supervisor has reviewed and approved an employee's goal setting form, the supervisor sends the form to the employee for approval. The employee must:

1. Click *Sign off on my goals*.
2. Click *Sign off*.
3. Click *OK*.
4. Close the form

Supervisor final approval

Once an employee has signed off the on the goal setting form, the form is sent to the supervisor for the approval. The supervisor must:

1. Click *Sign-off on goals of my direct reports*.

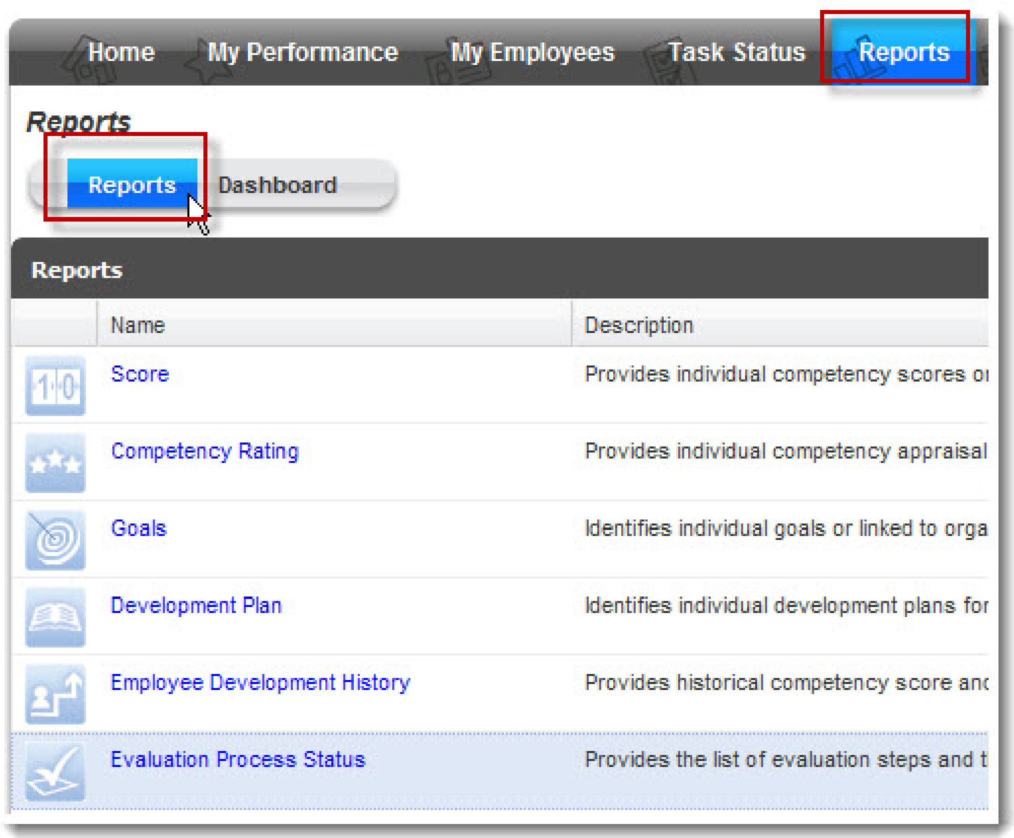


2. Click *Sign off*.
3. Click *OK*.
4. Repeat steps 2 and 3 to sign off the forms of other employees.

Generating reports

About reports

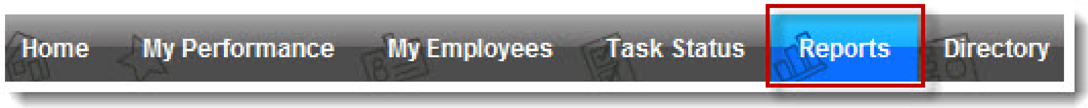
Halogen can generate a variety of reports. The employee's user type determines which reports they can generate.



Generating a score report

A score report shows an employee's general score as well as individual competency scores.

1. Click *Reports*



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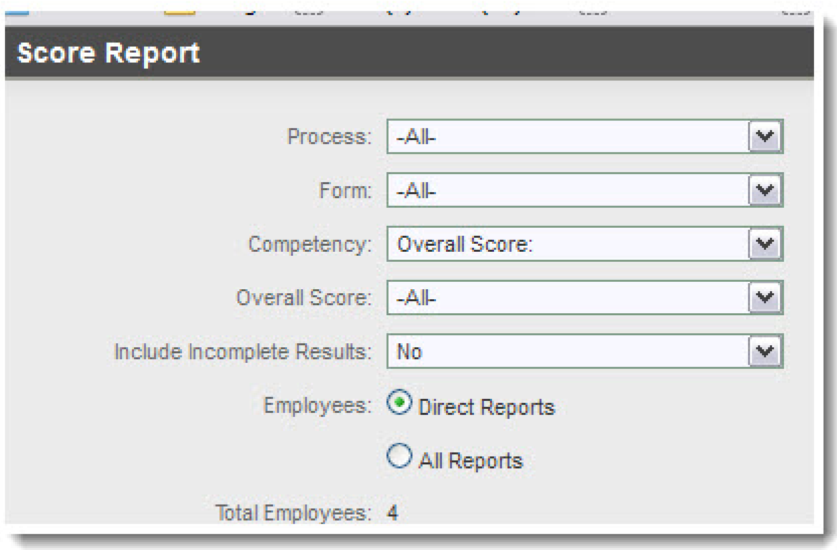
The score report is displayed in a new window.

2. Optional: Results can be filtered to meet reporting needs.



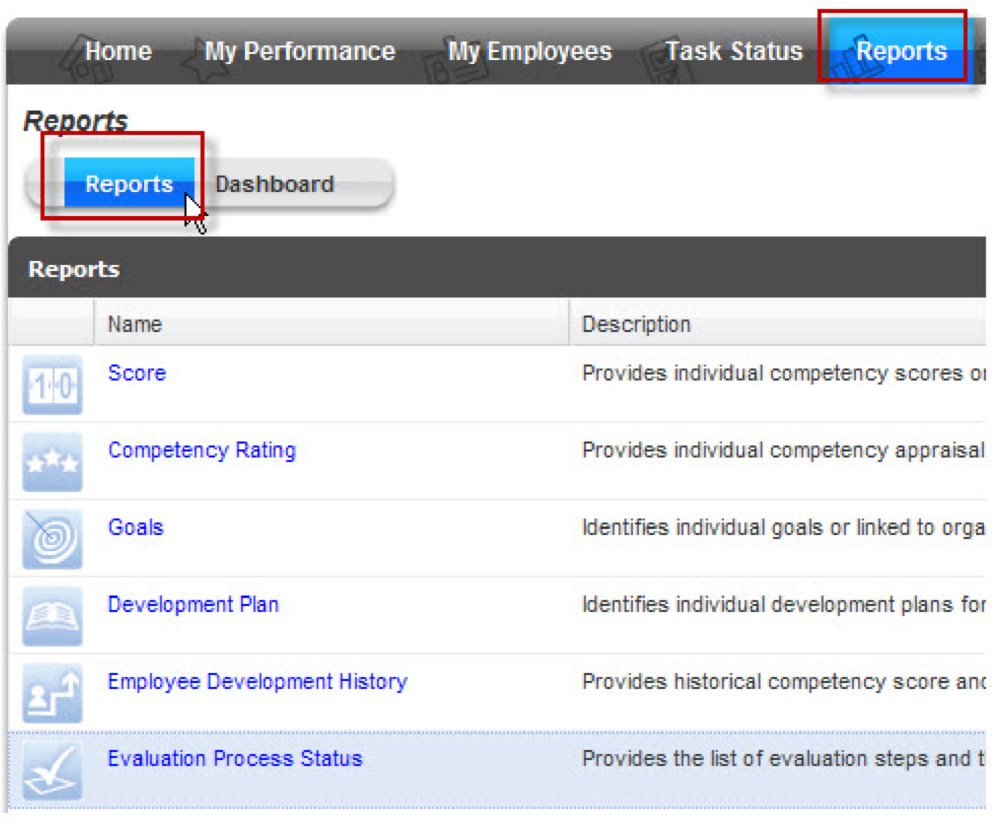
- *Process*: select the specific process from the drop-down list to view the corresponding scores.
- *Form*: select the form from the drop-down list to view the corresponding scores.
- *Competency*: select the specific competency from the drop-down list to view the corresponding score.
- *Overall Score*: select one of the operators from the drop-down list (greater than, less than, etc.) and then choose a value that appears in the field on the right. This will filter results to include those that meet the overall score parameters you entered.
- *Include Incomplete Results*: select «1»Yes«2» or «1»No«2» to include or exclude incomplete results.
- *Employees*: to view results for only those employees who report directly to you, select

Generating a competency rating report

A competency rating report shows the number of employees who have earned the same score for a given competency. For example, five employees scored «3» for «Client Service Orientation» and two employees scored «4» for «Teamwork and Cooperation». Employee names are not displayed in this report. Since competency ratings are expressed as a percentage, this report is very useful for identifying the strengths and following performance improvements for a given group of employees

1. Click *Reports*.

2. Click *Compentency Rating* in the *Names*



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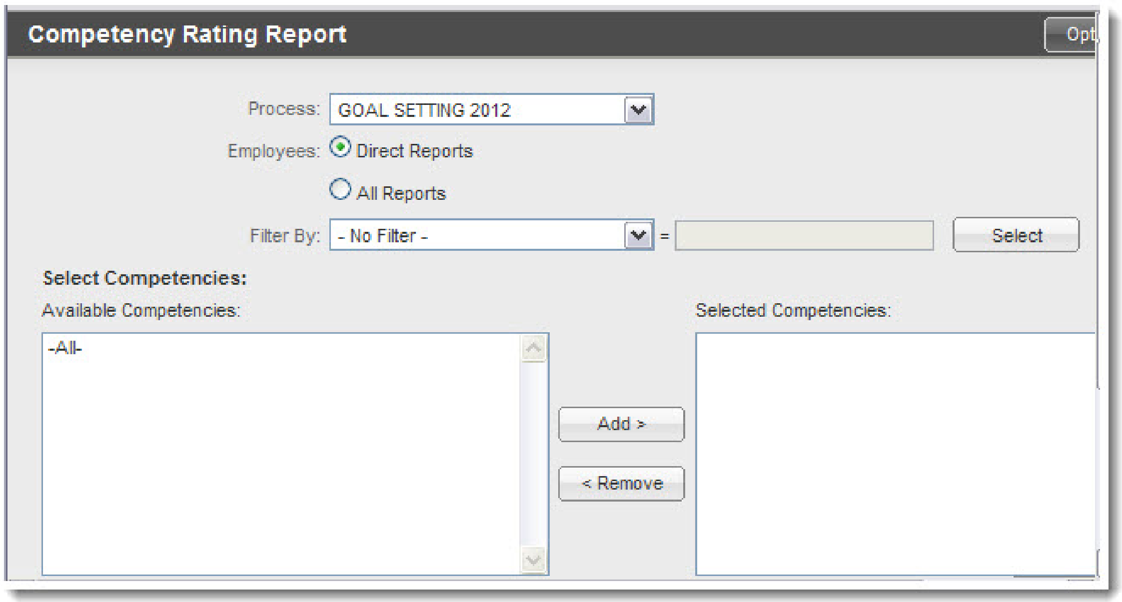
The competency rating report is displayed in a new window.

3. Optional: Results can be filtered to meet reporting needs.



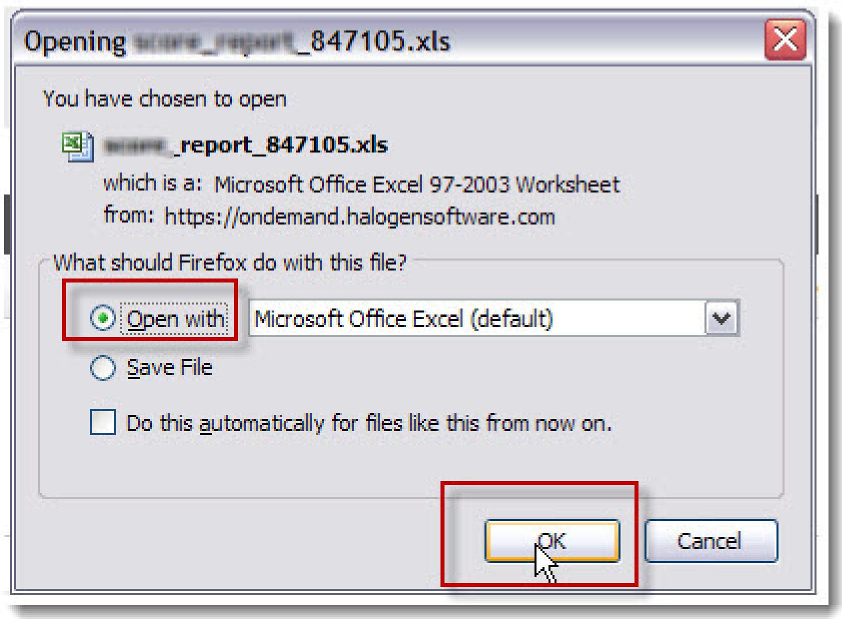
- *Employees*: to view direct results for only those employees who report directly to you, select *Direct Reports*: to view results for all employees you are responsible for, select *TAll Reports*.
- *Filter by*: select the desired parameters (Position Title, Position Number, Faculty or Service, etc.). Click *Select* to choose a value for the filter from the list, then click*OK*.
- *Select Competencies*: click from the available competencies or click *All* then click *Add*.

4. Click *Generate Report*.

5. Click *Export*. The report will be produced as an Excel document.

6. Select the *Open With* option (if this option appears).

7. Click *OK*.



8. The report will be produced as an Excel document.

Generating a goals report

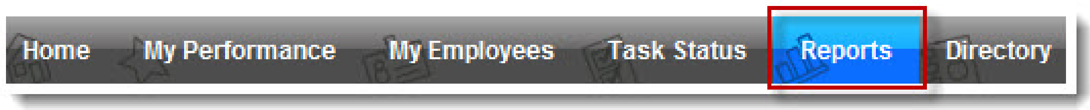
A goals report shows the goals for an employee (personal or related to the organization). The report shows different elements such as title, status, indicator, percentage of achievement for a goal, etc.

The goals report gives supervisors a quick overview of all the goals for an employee and answers questions such as:

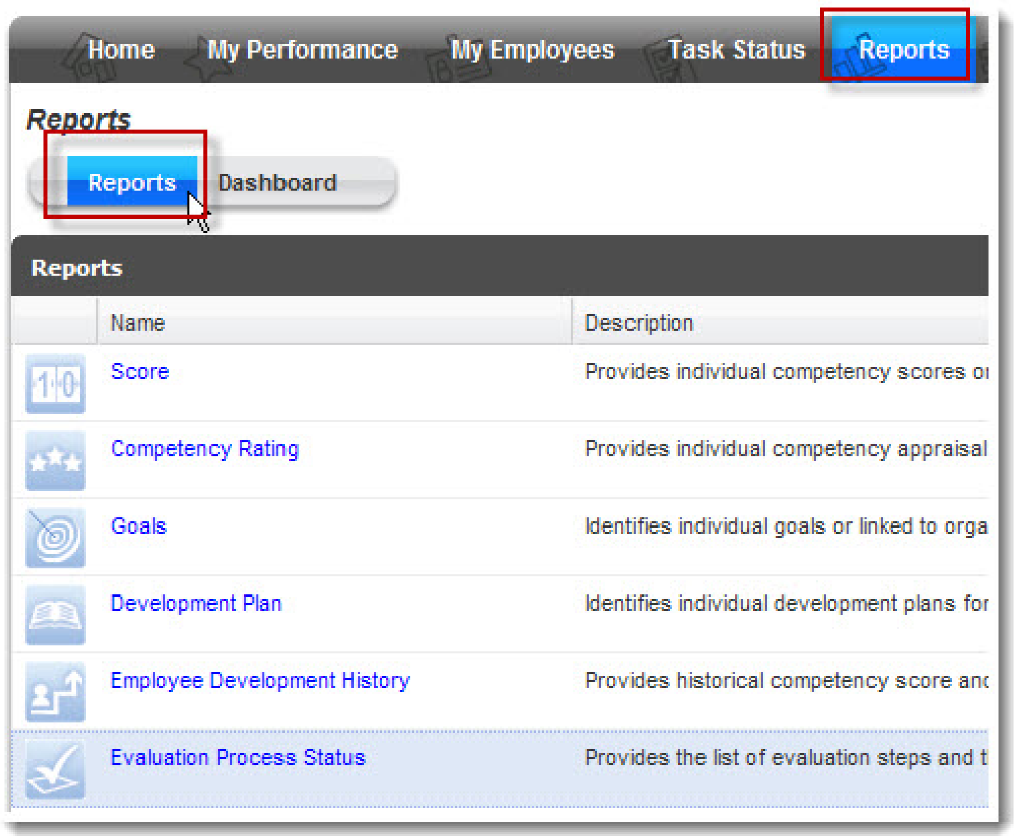
Which employees have goals with the status « Not Started »?

Are there any goals waiting to be approved?

1. Click *Reports*.

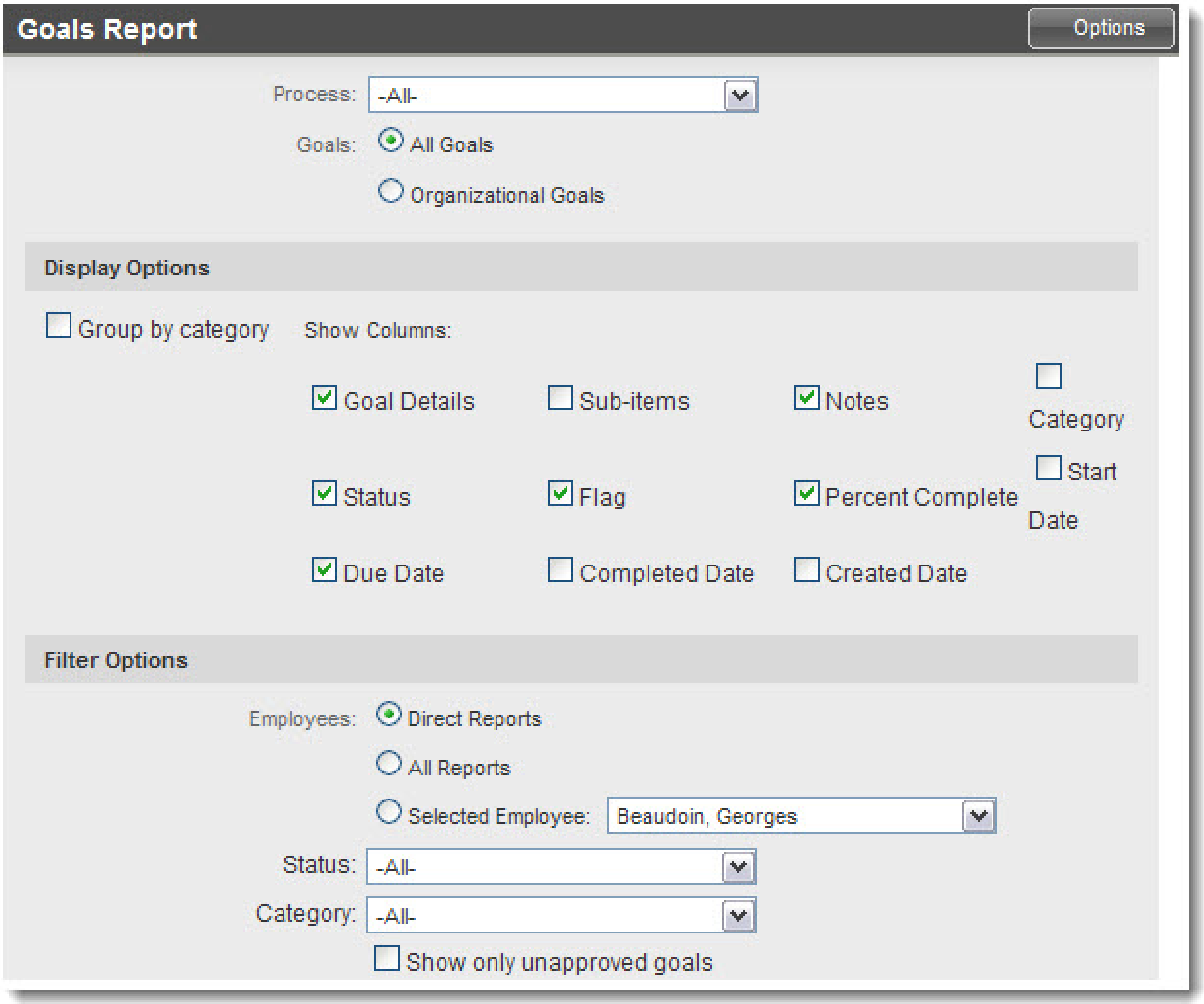


2. Click *Goals* in the *Name* column.



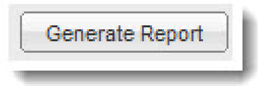
A goals report is displayed in a new window.

3. Results can be filtered to meet reporting needs.



- *Process*: select the specific process from the drop-down list to view the corresponding goals.
- *Goals*: Select *All Goals* or *Organizational Goals*.
- *Display Options*: *Group by category*, if desired. Under «5»Show Columns«6», select or deselect the columns to be displayed in the report. *Status*: select a status from the drop-down list.
- *Employees* : to view results for only those employees who report directly to you, select *Direct Reports* ; to view results for all employees you are responsible for, select *All Reports*; to view results for a specific employee, select Selected Employee and choose a name from the list. *Show only unapproved goals*: select this option for a list of all open goal forms.

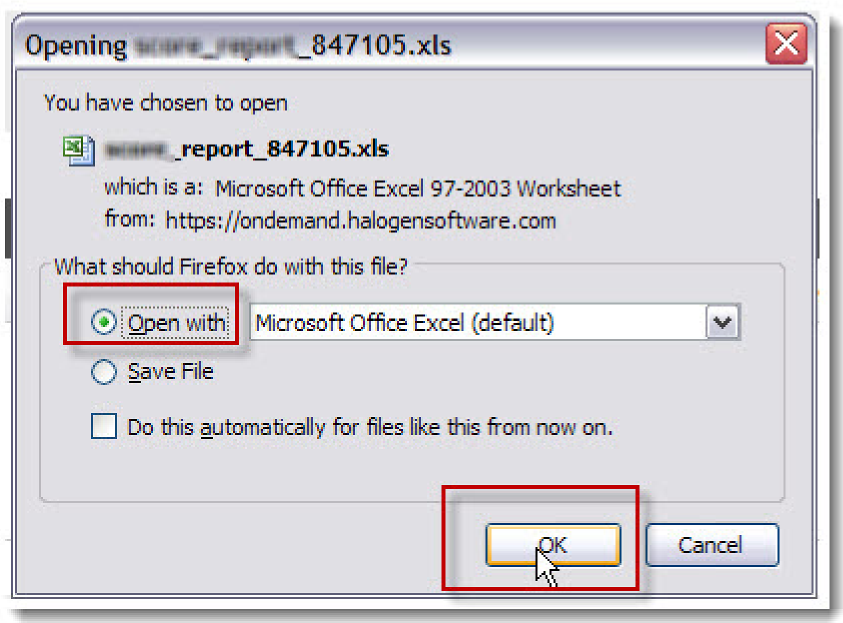
4. Click *Generate Report*.



5. Click *Export*. The report will be produced as an Excel document.

6. Select the *Open With* option (if this option appears).

7. Click *OK*.



8. The report will be produced as an Excel document.

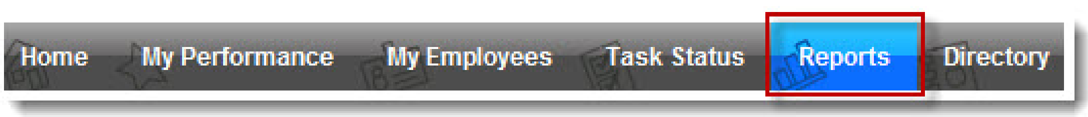
A	B	C	D	E	F	G	H
Direct Reports	Employee Name (Manager Name)	Goal	Status		Flag	Percent Complete	Due Date
Employees with Matching Goals							
	Gratton, Martine (Germain, Denis)	**Title:** Blah blah blah Blah blah blah **Notes:**			0%		
	Gratton, Martine (Germain, Denis)	**Title:** Blah blah blah Blah blah blah **Notes:**			0%		
	Gosselin, François (Germain, Denis)	**Title:** Blah blah blah Blah blah blah **Notes:**			0%		

Generating a development plan report

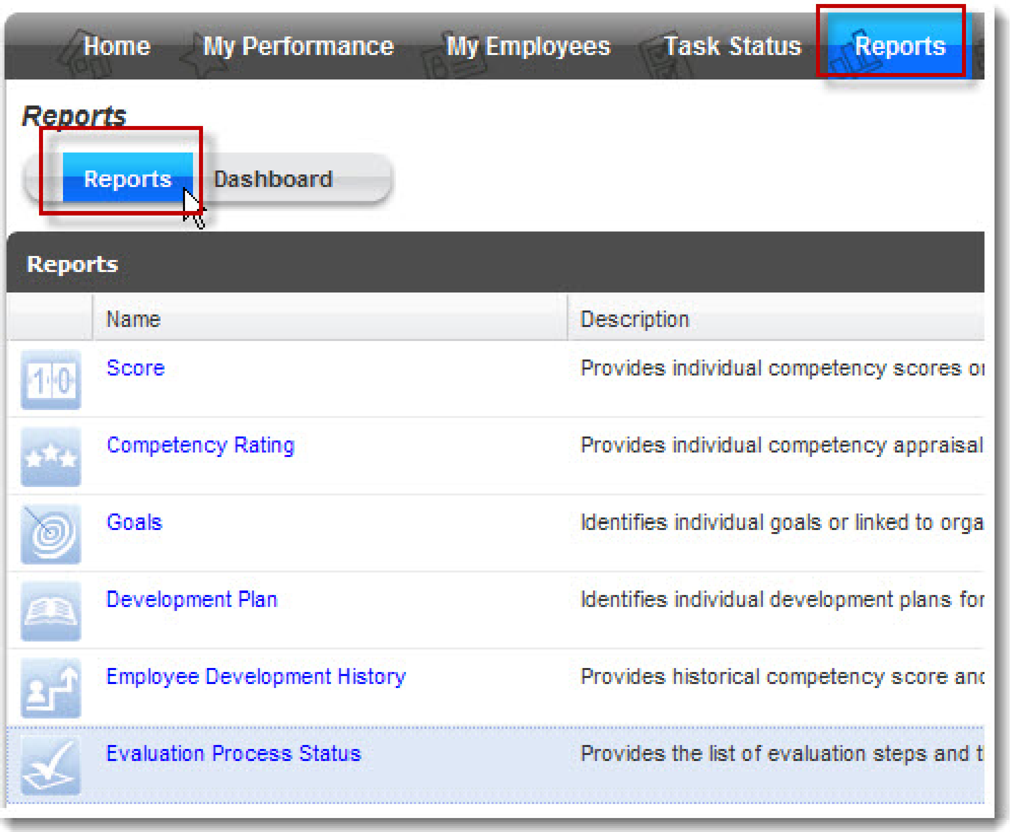
A development plan report shows a list of development plans for the supervisor's employees. The report shows the different elements of the plan (title, category, status, etc.).

Reports can be generated for all employees or by process, and results can be filtered by process, status, related competency, category and employee type.

1. Click *Reports*.



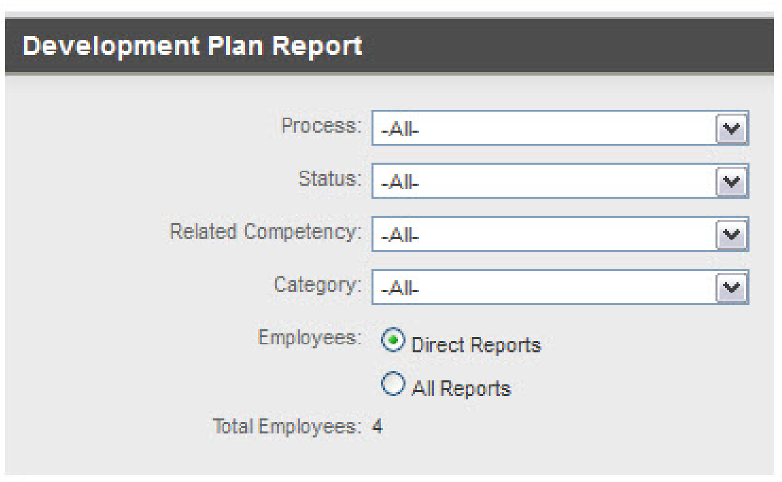
2. Click *Development Plan*, in the *Name*



column.

The development plan report is displayed in a new window.

3. Optional: Results can be filtered to meet reporting needs.



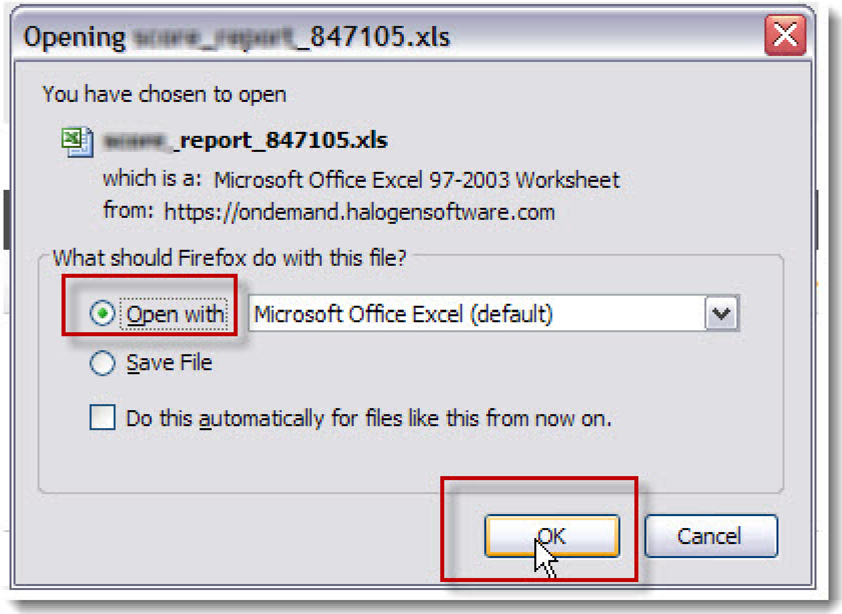
- *Process*: select the specific process from the drop-down list to view the development plan
- *Status*: select a status from the drop-down list.
- *Related Competency*: select a competency.
- *Category*: select a category from the drop-down list.
- *Employees*: to view results for only those employees who report directly to you, select Direct Reports; to view results for all employees you are responsible for, select All Reports.

4. Click *Generate Report*.

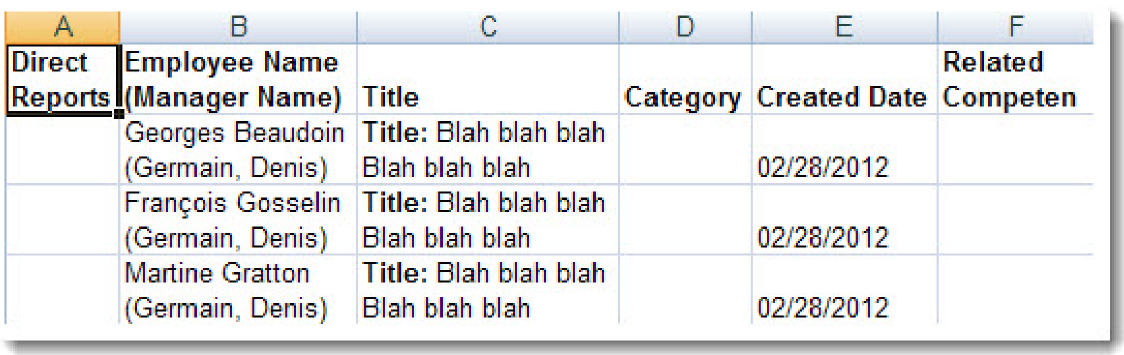
5. Click *Export*. The report will be produced as an Excel document.

6. Select the *Open With* option (if this option appears).

7. Click *OK*.



8. The report will be produced as an Excel document.

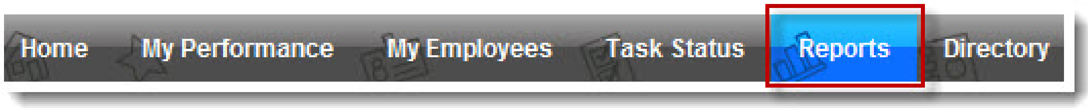


A	B	C	D	E	F
Direct Reports	Employee Name (Manager Name)	Title	Category	Created Date	Related Competen
	Georges Beaudoin (Germain, Denis)	Title: Blah blah blah Blah blah blah		02/28/2012	
	François Gosselin (Germain, Denis)	Title: Blah blah blah Blah blah blah		02/28/2012	
	Martine Gratton (Germain, Denis)	Title: Blah blah blah Blah blah blah		02/28/2012	

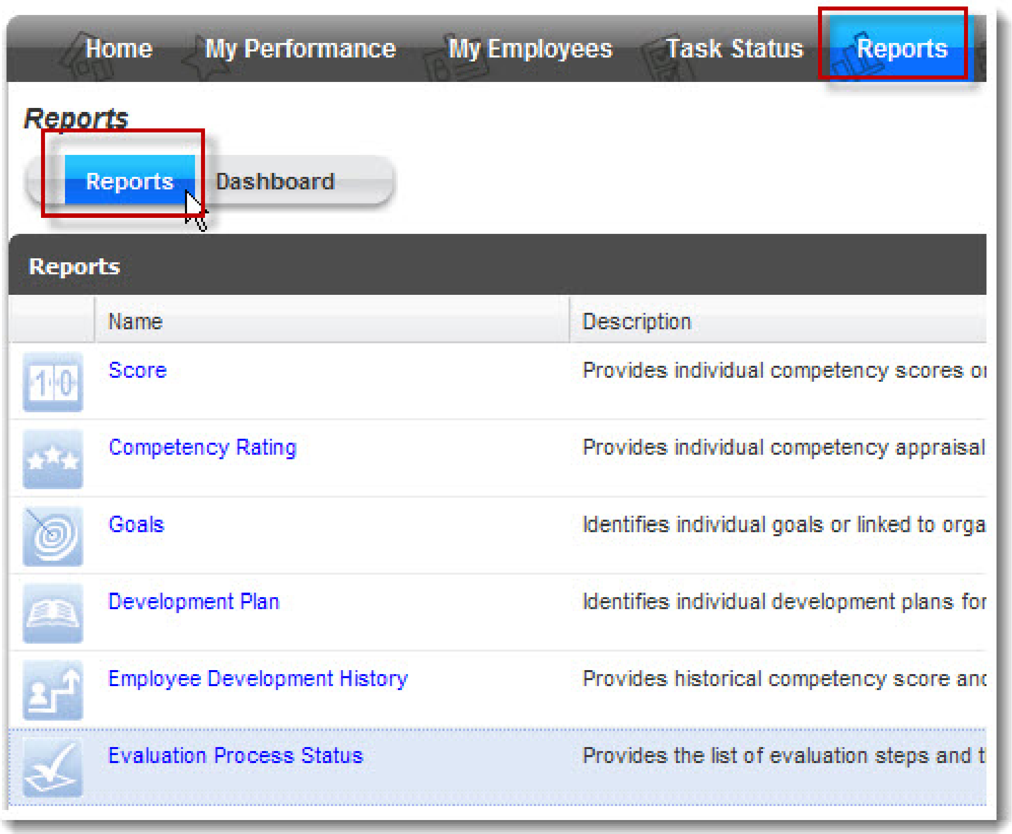
Generating an employee development history report

This report shows employees competency scores over time. If a learning activity or any professional development is associated with a competency, the supervisor can use the report to assess the effectiveness of the activity.

1. Click *Reports*.

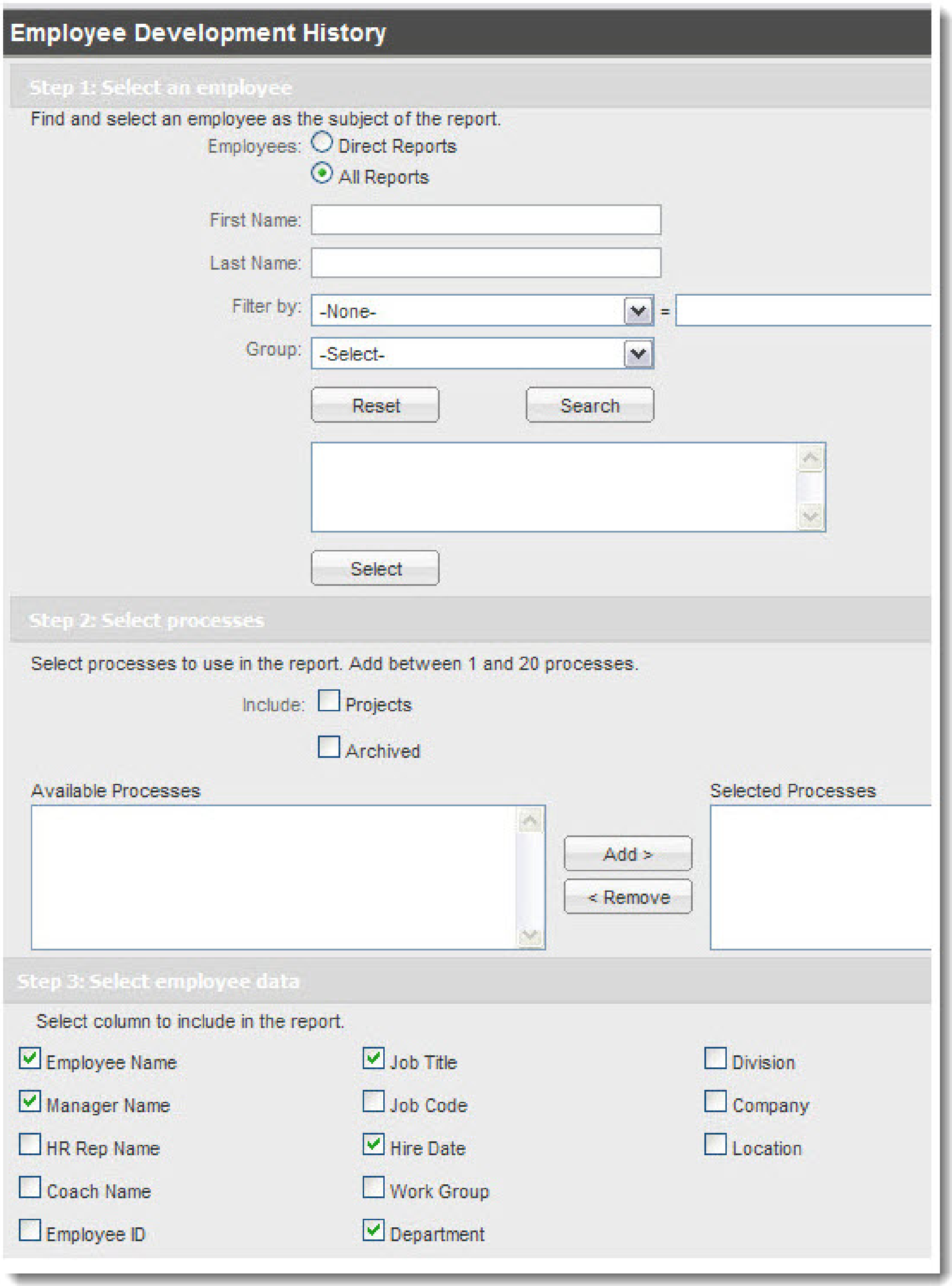


2. Click the *Employee Development History* in the *Name* column.



The employee development history report is displayed in a new window.

3. Optional: Results can be filtered to meet reporting needs:


Employee Development History
Step 1: Select an employee
Find and select an employee as the subject of the report.
Employees:
Direct Reports
All Reports
First Name:
Last Name:
Filter by:
-None-
Group:
-Select-
Reset
Search
Select
Step 2: Select processes
Select processes to use in the report. Add between 1 and 20 processes.
Include:
Projects
Archived
Available Processes
Add >
< Remove
Selected Processes
Step 3: Select employee data
Select column to include in the report.
Employee Name
Manager Name
HR Rep Name
Coach Name
Employee ID
Job Title
Job Code
Hire Date
Work Group
Department
Division
Company
Location

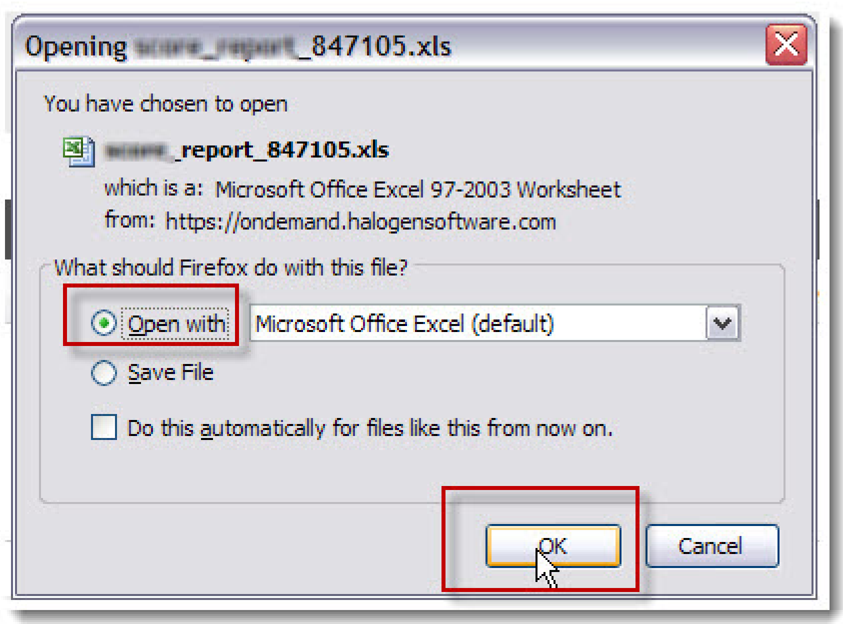
- Enter the employee's first and last names where indicated.
- *Filter by:* select the desired filter (phone extension, faculty or service, etc.). Fine tune the filter if desired by selecting options in the secondary list.
- *Group:* select a group
- *Inactive Employees* select this option to include results for inactive employees.

4. Click *Generate Report*.

5. Click *Export:* The report will be produced as an Excel document

6. Select the *Open With* option (if this option appears). Choose Excel.

7. Click *OK*.



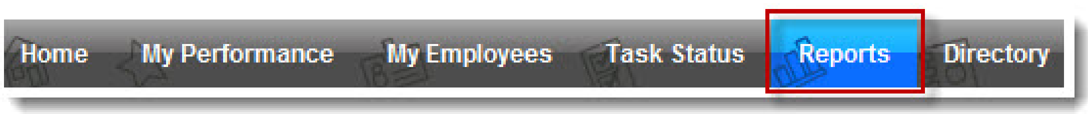
8. The report will be opened in a Microsoft Excel window.

A	B	C	D	E	F
Direct Reports	**Employee Name (Manager Name)**	**Title**	**Category**	**Created Date**	**Related Competen**
	Georges Beaudoin (Germain, Denis)	**Title:** Blah blah blah Blah blah blah		02/28/2012	
	François Gosselin (Germain, Denis)	**Title:** Blah blah blah Blah blah blah		02/28/2012	
	Martine Gratton (Germain, Denis)	**Title:** Blah blah blah Blah blah blah		02/28/2012	

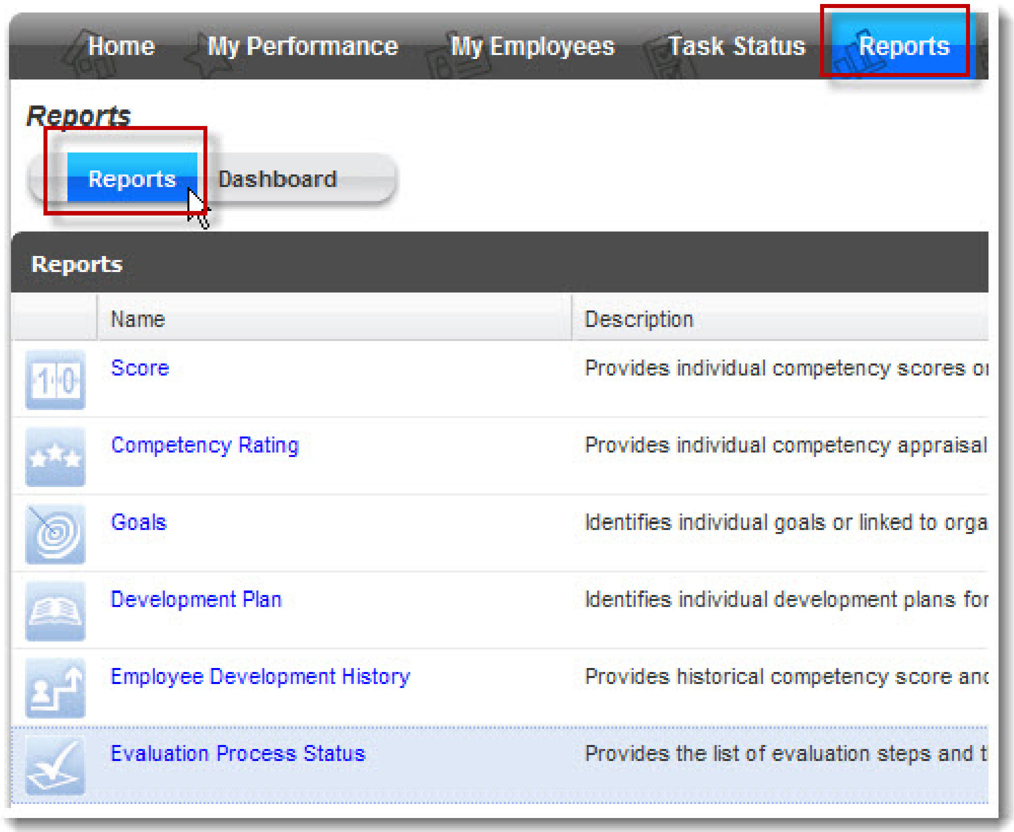
Generating an evaluation process status report

This report lists each step of an evaluation and their respective status.

1. Click *Reports*.



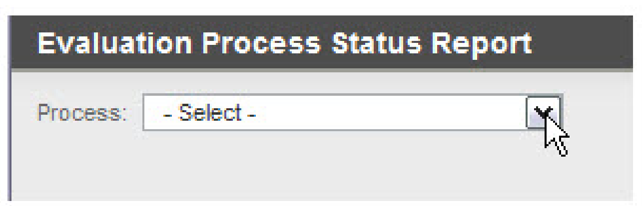
2. Click *Evaluation Process Status* in the *Name*



column.

The evaluation process status report is displayed in a new window.

3. To filter by *Process*, select a process to view the corresponding evaluation steps.

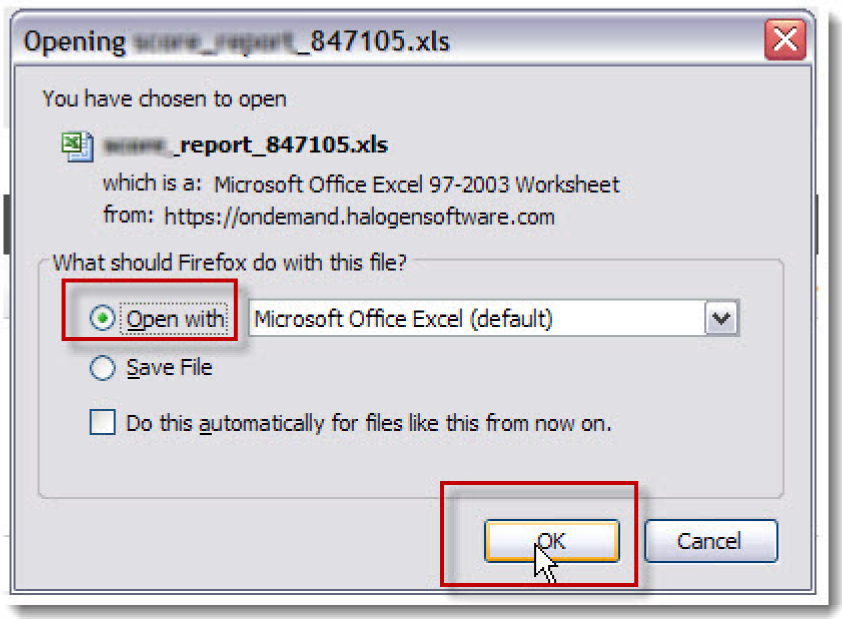


4. Click *Generate Report*.

5. Click *Export*. The report will be produced as an Excel document.

6. Select the *Open With* option (if this option appears).

7. Click *OK*.



8. The report will be produced as an Excel document.

A	B	C	D	E	F
Direct Reports	**Employee Name (Manager Name)**	**Title**	**Category**	**Created Date**	**Related Competen**
	Georges Beaudoin (Germain, Denis)	**Title:** Blah blah blah Blah blah blah		02/28/2012	
	François Gosselin (Germain, Denis)	**Title:** Blah blah blah Blah blah blah		02/28/2012	
	Martine Gratton (Germain, Denis)	**Title:** Blah blah blah Blah blah blah		02/28/2012	

Dashboard

About the dashboard

The dashboard provides supervisors an overview of some of the reports available, which allows them to compare data and see trends. The following reports are accessible in the dashboard: *Process Status, Score Distribution, Competency Scores and Goal Status.*

The dashboard can be used to display data for specific processes and make comparisons between processes. The dashboard can be configured to display only certain groups of employees (only direct reports, all reports).

The dashboard reports are linked to different processes used in Halogen. This means that some reports cannot be generated until the data for the related process is available. For example, a competency scores report cannot be generated if the goal setting process is not yet complete.

The following elements appear in the dashboard:

1. *Process Status:* shows completed *steps*, in *step* and *specific step* for a specific process.
2. *Score Distribution:* shows the score distribution for a specific process.
3. *Competency Scores:* shows scores of evaluated competencies for a specific process. Scores can be listed in increasing or decreasing order.
4. *Goal Status:* shows the status of the organizational goals for a specific process.

Process status chart

The process status chart can present data such as the number of employees who have completed a specific step and the number with steps not yet completed. The user must select a process, and processes can be compared.

The data can be plotted on a pie chart or on a bar chart.

1. Click *Reports*.
2. Click *Dashboard*.
3. Click on the desried process in the*View Process* drop-down list.
4. Optional: If desired, click on a second process in the *Compare Process* drop-down list to allow a comparison with the first process.
5. Select *Direct Reports* to chart data for only those employees who report directly to you select All Reports to chart data for all employees who report to you.

   L'option

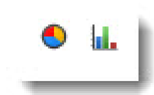
6. Click *Update Dashboard* to save your settings and update the charts.

7. Select the parameters for the *process status* chart:

a) Select«1»Completed Steps«2» to view data related to «1»completed steps«2».
b) Select«1»In Step«2» to view data for steps not yet completed.
c) Select «1»Specific Step«2» to view data for the selected step.

Then select a step in the *View* drop-down list.

8. Click the «1»pie chart«2» icon or the «3»bar chart«4» icon to display the results as desired.



Lorsque les données sont trop nombreuses, la légende indique que les éléments ne sont pas tous affichés. En agrandissant la vue, on peut voir davantage de données.